



Job Codes

2017 - Summer Edition

User Guide - Table of Contents

[Accessing the Tool](#)

[Create New Job Codes](#)

[General Information](#)

[Employees](#)

[Rate](#)

[Ledger](#)

[Save and Close](#)

[Apply/ Remove Job Codes within Employee Profile](#)

[Best Practices](#)

[Frequently Asked Questions](#)

Overview

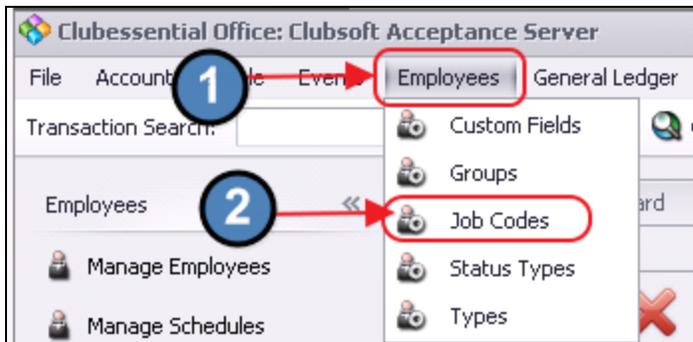
Job Codes are the primary mechanism used to track hours worked and pay rates within the Office timekeeping system. In addition, Job Codes must be assigned to any Employee who will be clocking in/out at the POS.

Use Case(s)

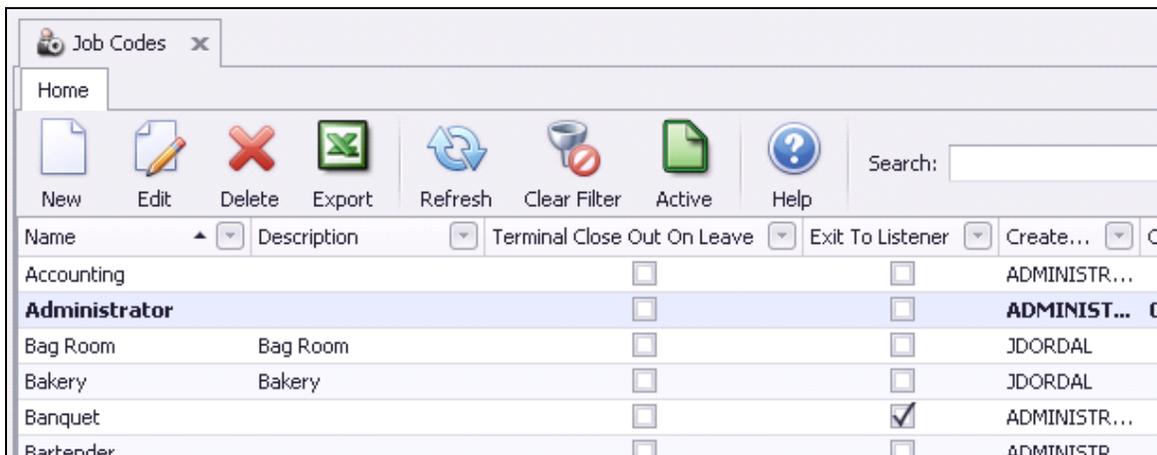
A new hourly employee started today in the Golf Shop. To ensure the employee can clock-in and out, and his hours and pay are tracked properly through the timekeeping system, it is essential to assign the Employee to the proper Job Code, and populate his hourly rate appropriately.

Accessing the Tool

To access **Job Codes**, select **Employees** across the top toolbar, and choose **Job Codes**.



The **Job Codes Grid** will launch.



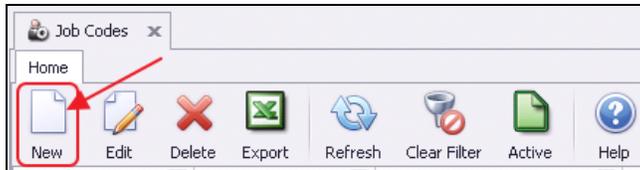
The primary functions associated with managing **Job Codes** are embedded in the Job Code

setup screen, which can be accessed by double-clicking on an existing Job Code (to edit an existing code), or clicking the **New** button (to create a new code).

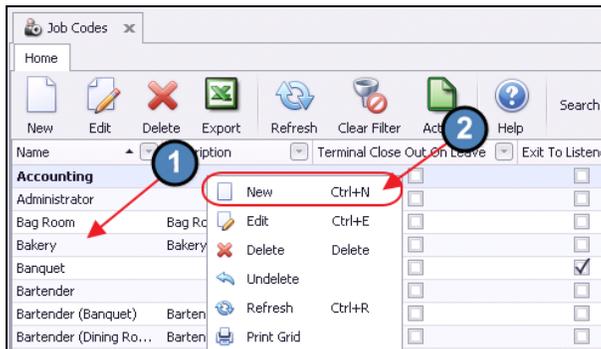
Create New Job Codes

To create a new **Job Code**, navigate to the **Job Codes Grid**, then perform either of the following to launch the **Job Code** setup screen:

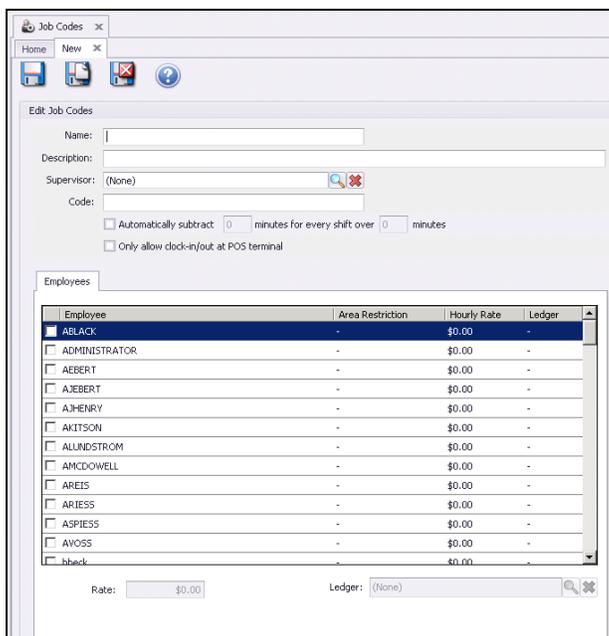
- 1) Click the **New** icon on the toolbar.



- 2) Or, **right-click** anywhere on the **Job Codes Grid** and select **New**.



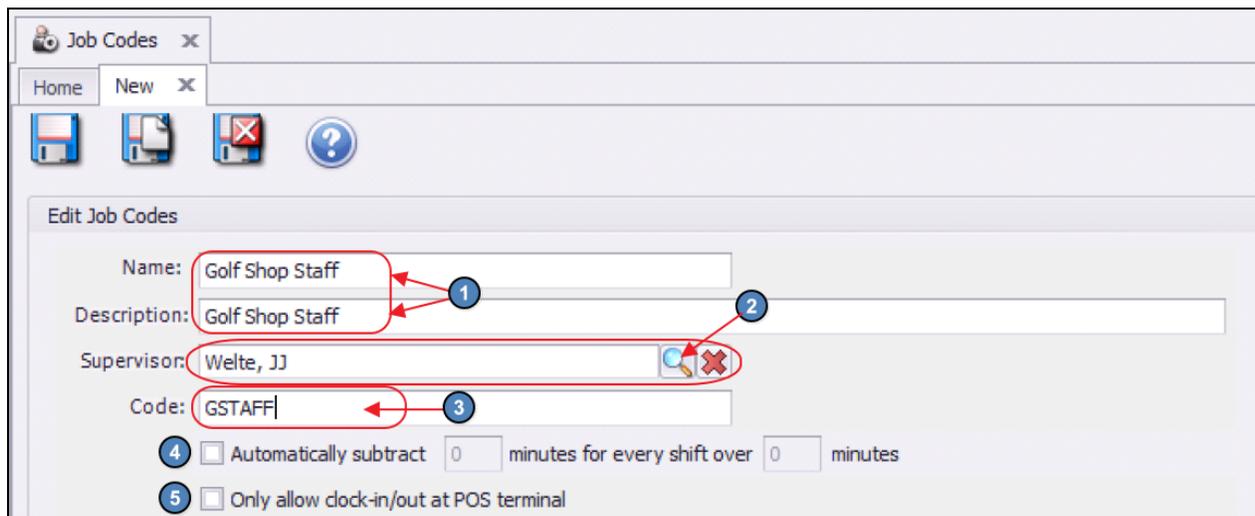
The **Job Code** setup screen will launch.



Begin setup by populating the **General Information** at the top of the screen.

General Information

- 1) Enter a **Name** and **Description** (optional) for the **Job Code**.
- 2) **Supervisor** - Enter the supervisor of the employees within the **Job Code** (optional). Note the lookup feature is available to assist with populating this field.
- 3) **Code** - Enter a unique value for the **Job Code**. This will be the code used if Payroll is exported to a third party vendor.
- 4) **Automatically Subtract** - Only used when our **Scheduling Module** is utilized. If an employee works longer than a certain allotted time, checking this box will subtract a specific amount of time (in minutes) from their timesheet. For instance, this could be used to automatically deduct a lunch break from an employee's timesheet.
- 5) **Only Allow Clock in/Out at POS Terminal** - If checked, employees within the **Job Code** will only be able to clock in and out at the POS; all other POS functions will be restricted.



Once General Information is populated, proceed to the Employees tab at the bottom portion of the setup screen.

Employees

The **Employees** tab displays a list view of all employees with the **Job Code**.

Although it is recommended to add/remove employees to/from the Job Code within the individual employee profile, this can also be done here by simply checking or unchecking the flag next to the **Employee's Username**.

Employees

| Employee | Area Restriction | Hourly Rate | Ledger |
|--|------------------|-------------|--------|
| <input checked="" type="checkbox"/> acatolos | - | \$0.00 | - |
| <input checked="" type="checkbox"/> ACortez | - | \$0.00 | - |
| <input type="checkbox"/> ADMINISTRATOR | - | \$0.00 | - |
| <input type="checkbox"/> AQUATICS | - | \$0.00 | - |
| <input type="checkbox"/> aseine | - | \$0.00 | - |
| <input type="checkbox"/> AStrittmatter | - | \$0.00 | - |
| <input type="checkbox"/> BBruning | - | \$0.00 | - |
| <input type="checkbox"/> beng | - | \$0.00 | - |
| <input type="checkbox"/> BPacella | - | \$0.00 | - |
| <input type="checkbox"/> BPerkins | - | \$0.00 | - |
| <input type="checkbox"/> BSmith | - | \$0.00 | - |
| <input type="checkbox"/> CErwin | - | \$0.00 | - |
| <input type="checkbox"/> cesales | - | \$0.00 | - |

Rate: Ledger:

Rate

To add an hourly **Rate** to an employee, click to select the employee in question (will be highlighted in blue when selected), and in the **Rate** field, type the appropriate dollar amount.

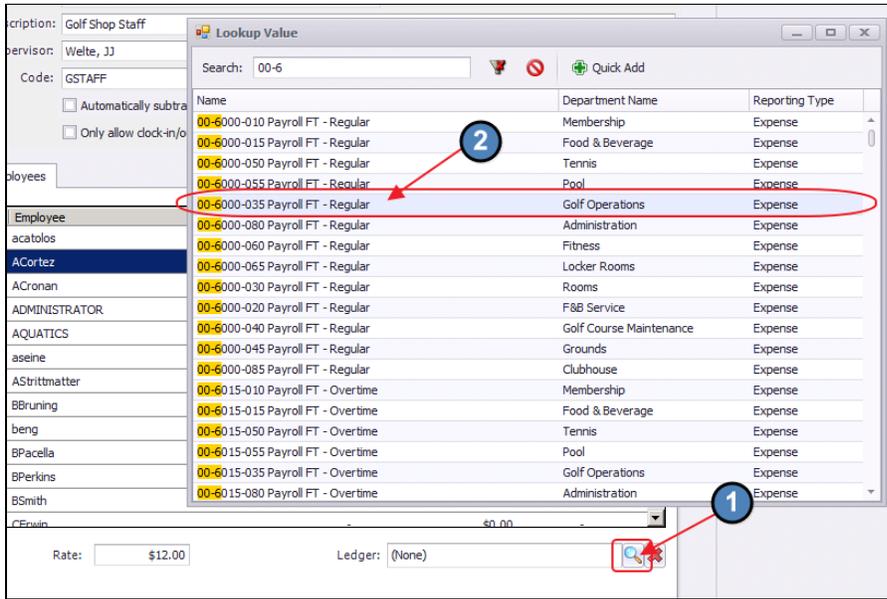
Employees

| Employee | Area Restriction | Hourly Rate | Ledger |
|--|------------------|-------------|--------|
| <input checked="" type="checkbox"/> acatolos | - | \$0.00 | - |
| <input checked="" type="checkbox"/> ACortez | Golf Shop | \$12.00 | - |
| <input type="checkbox"/> ACronan | - | \$0.00 | - |
| <input type="checkbox"/> ADMINISTRATOR | - | \$0.00 | - |
| <input type="checkbox"/> AQUATICS | - | \$0.00 | - |
| <input type="checkbox"/> aseine | - | \$0.00 | - |
| <input type="checkbox"/> AStrittmatter | - | \$0.00 | - |
| <input type="checkbox"/> BBruning | - | \$0.00 | - |
| <input type="checkbox"/> beng | - | \$0.00 | - |
| <input type="checkbox"/> BPacella | - | \$0.00 | - |
| <input type="checkbox"/> BPerkins | - | \$0.00 | - |
| <input type="checkbox"/> BSmith | - | \$0.00 | - |
| <input type="checkbox"/> CErwin | - | \$0.00 | - |

Rate: Ledger:

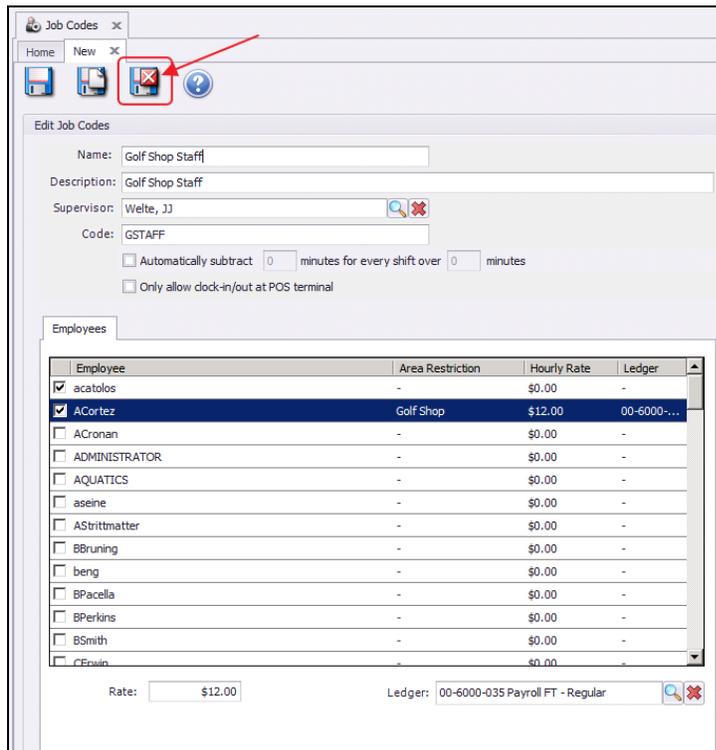
Ledger

To add an **Expense Payroll Ledger** to an employee, click the ledger lookup and select the appropriate ledger. The **Expense Payroll Ledger** is simply for **reporting** purposes, it will not produce any type of Journal Entry.



Save and Close

Lastly, click **Save & Close** to complete the setup of the new **Job Code**.



Apply/ Remove Job Codes within Employee Profile

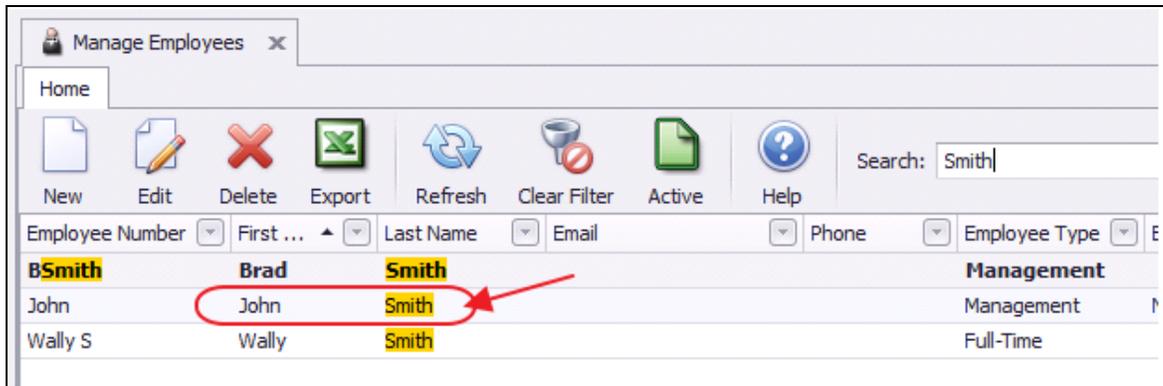
As previously mentioned, it is recommended to add/remove employees to/from the Job Code within the individual employee profile.

To do so,

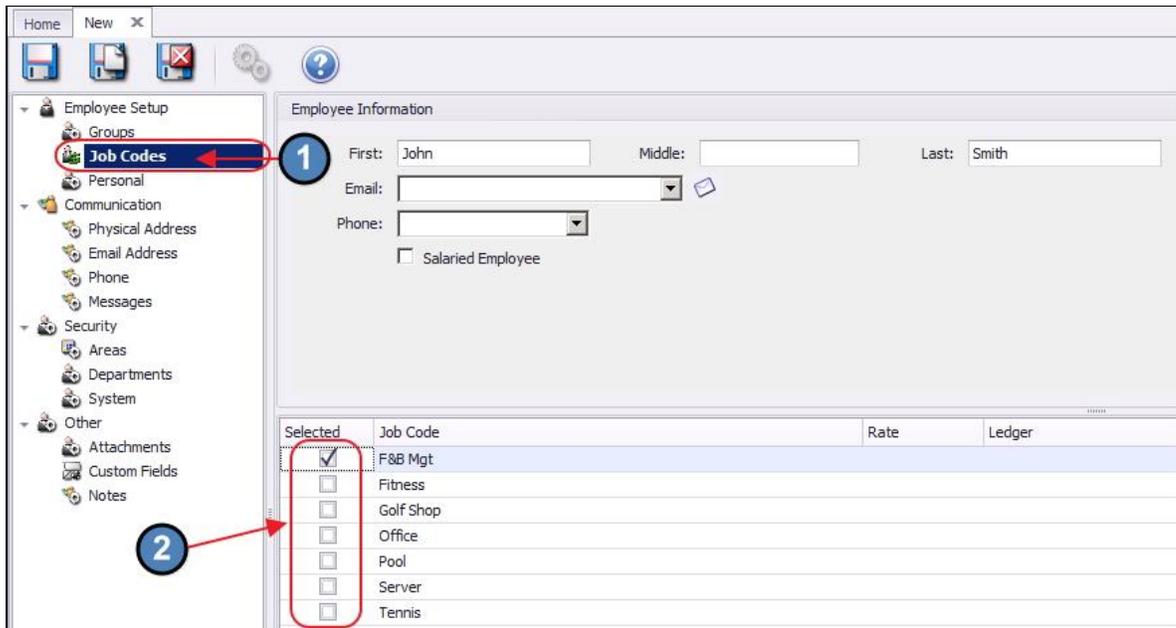
- 1) Navigate to the **Employee** Module on the left user menu and select **Manage Employees**.



- 2) The **Manage Employees** grid will launch. Double click the applicable Employee to add/remove the Job Code.

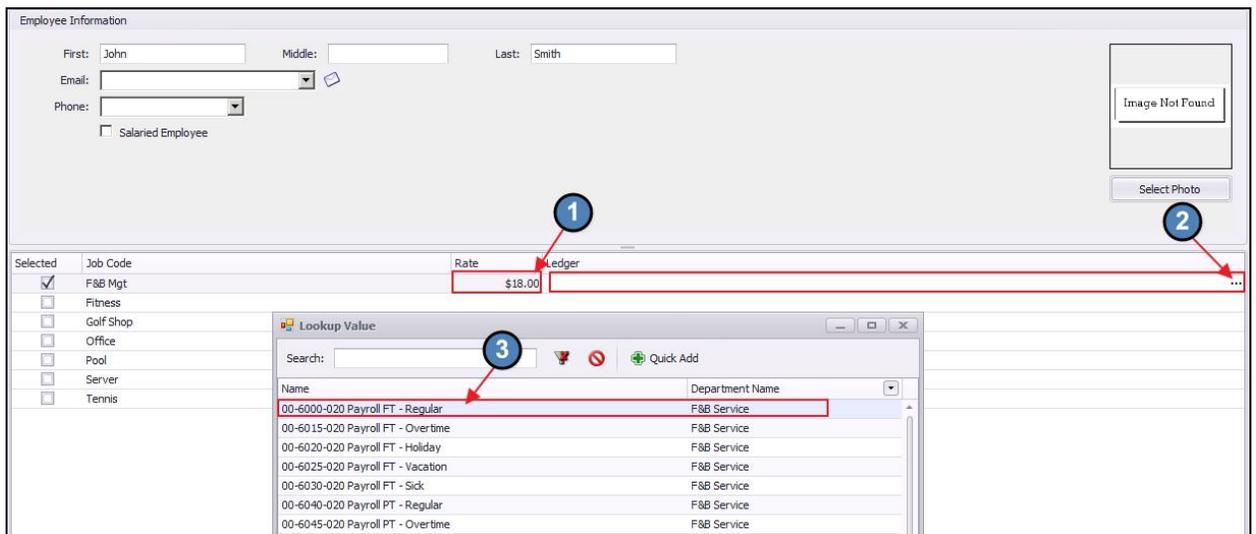


- 3) Select the **Job Codes** tab on the left pane. Next, Select the Employee's applicable **Job Codes**.



4) Although it is best practice to add the **Rate** and **Expense Payroll Ledger** at the **Job Code** level, they can be added on an individual basis here.

- To add a **Rate**, click to select the **Rate** field and type the appropriate dollar amount. This rate will be on an hourly basis.
- To add an **Expense Payroll Ledger**, click the ledger lookup button (three dots) and select the appropriate ledger. The **Expense Payroll Ledger** is simply for **reporting** purposes, it will not produce any type of Journal Entry.



Best Practices

While the functionality exists to automatically subtract minutes worked from an employee's shift (for lunch, etc), ensure you are familiar with your State's labor laws prior to determining whether it is appropriate for your Club's use.

Assign Hourly Rate and Ledger Expense accounts within the Job Code setup screen (rather than the Employee Profile screen), to improve comparability and visibility across employees within the same Job Code.

Frequently Asked Questions

How can I ensure employees can clock-in/out at the POS, but not access any other POS features?

Check the **Only Allow Clock in/Out at POS Terminal** option for the Job Code. When checked, all functionality except clocking in and out is restricted for Employees assigned to the Job Code.