Set up payroll and invite your accountant

TeamMap turns your guards' clock-ins into a pay report: hours, overtime and pay for each guard. Set your pay rules once, then invite your accountant. They get their own login and the report by email, at no charge.

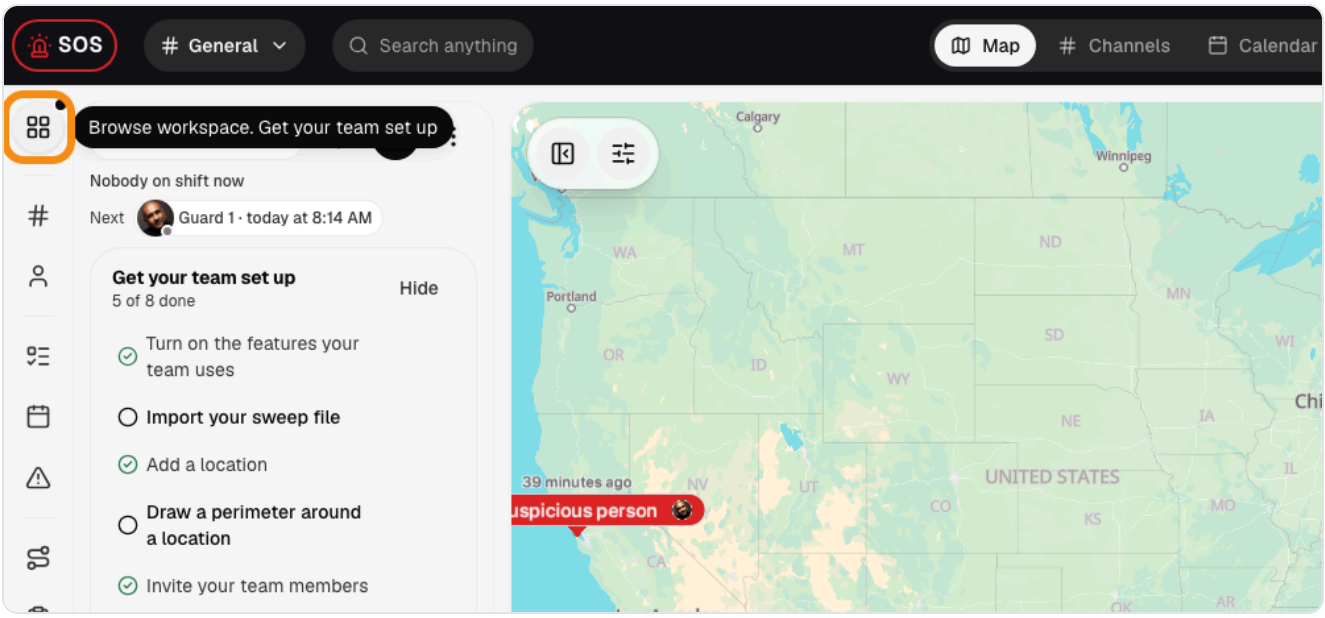
Before you start

- An owner or admin login. Sign in at app.teammap.co on a computer.
- Your guards clock in and out in the TeamMap app. Those times are the hours on the report.
- Your accountant's email address.
- Shifts turned on for your team (Team settings > Features).

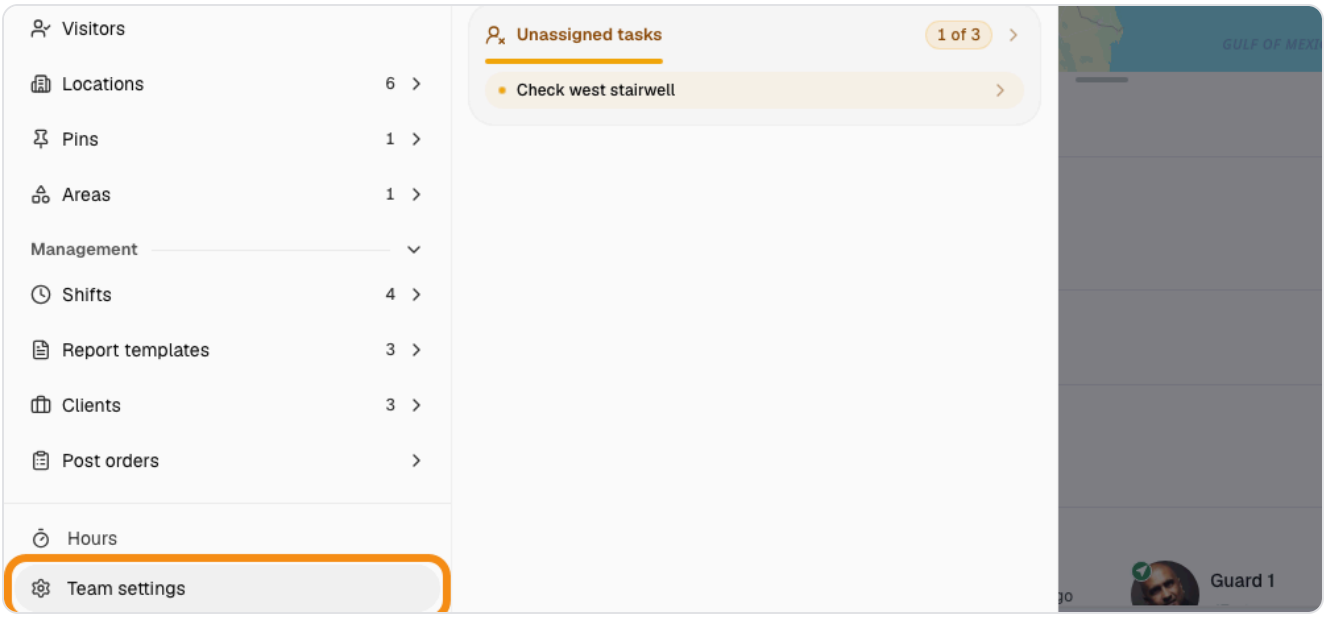
Set up payroll

1 Turn on pay rates

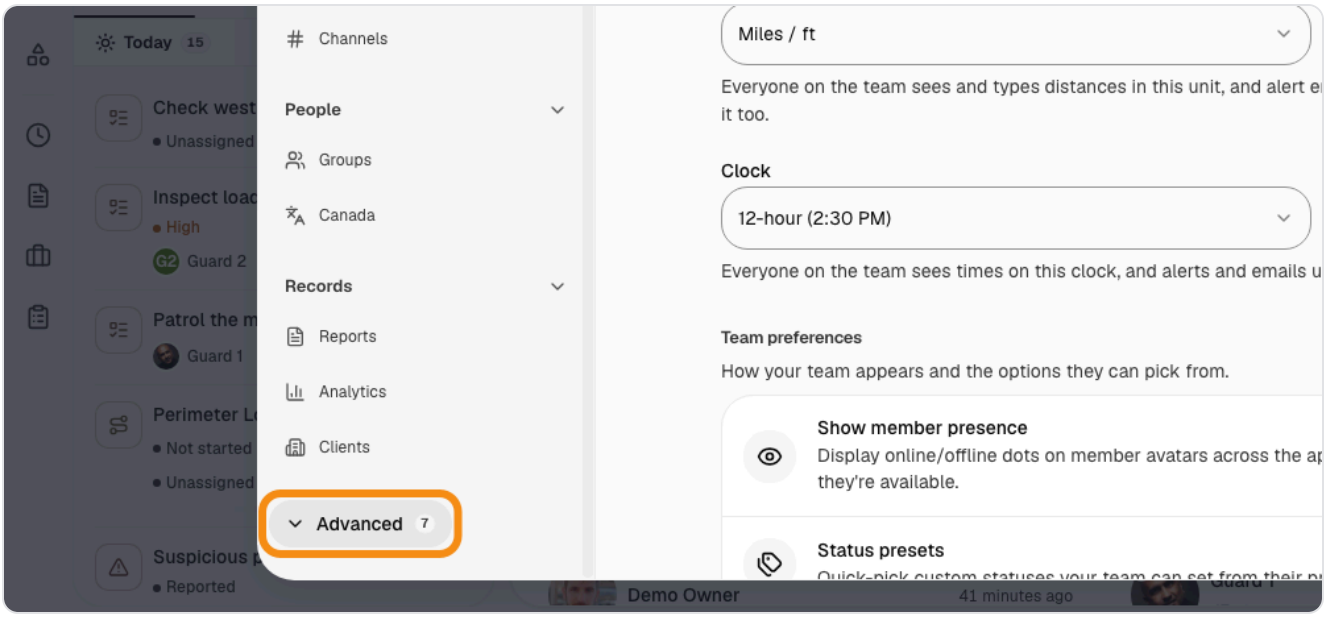
1. Click the grid button at the top left, then Team settings.
2. Open Advanced and click Member fields.
3. Turn on Hourly rate. It stays admin only, so guards cannot see each other's pay.



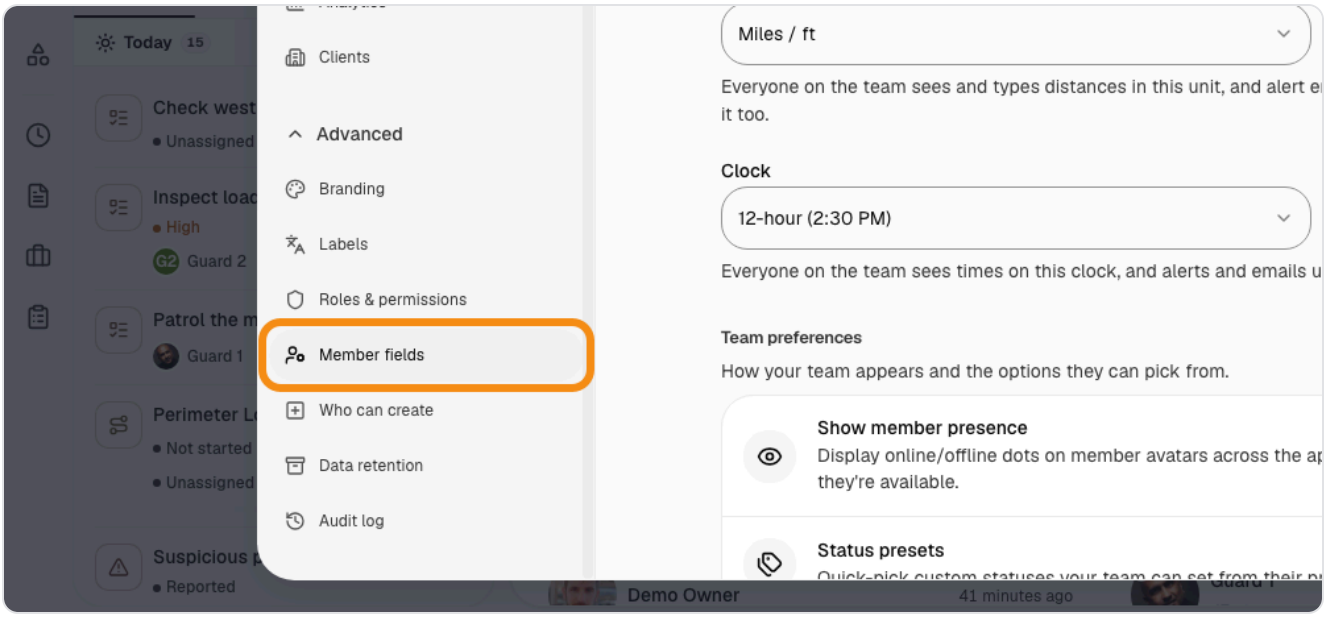
Click the grid button at the top left.



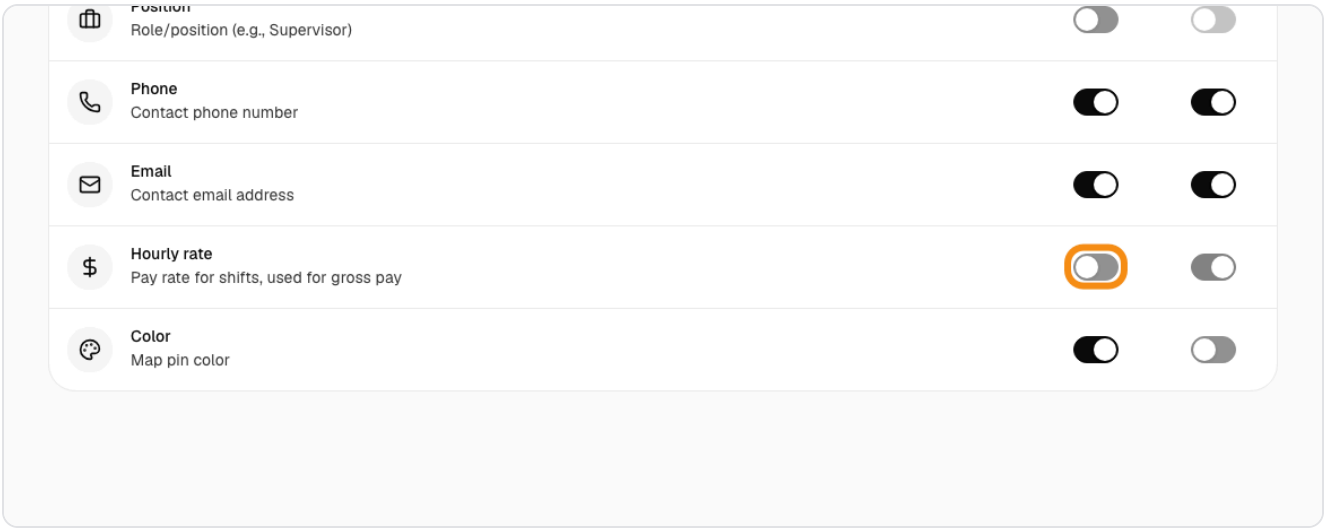
Click Team settings.



Open Advanced.



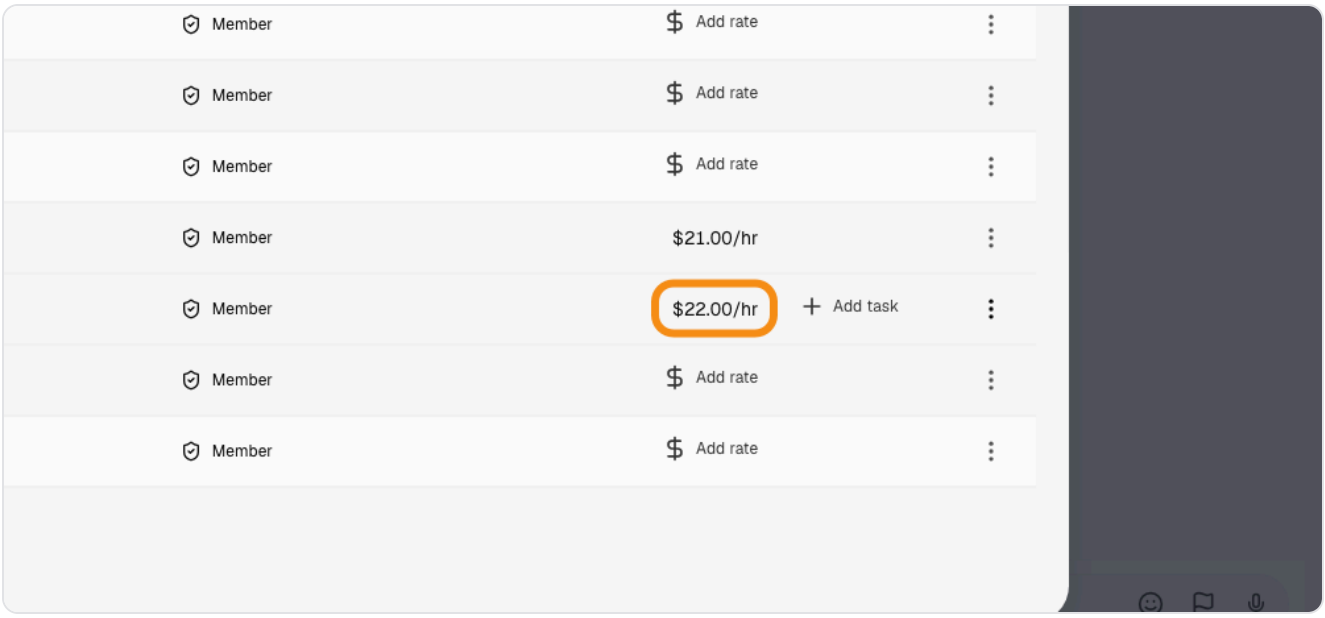
Click Member fields.



Turn on Hourly rate.

2 Put in each guard's pay

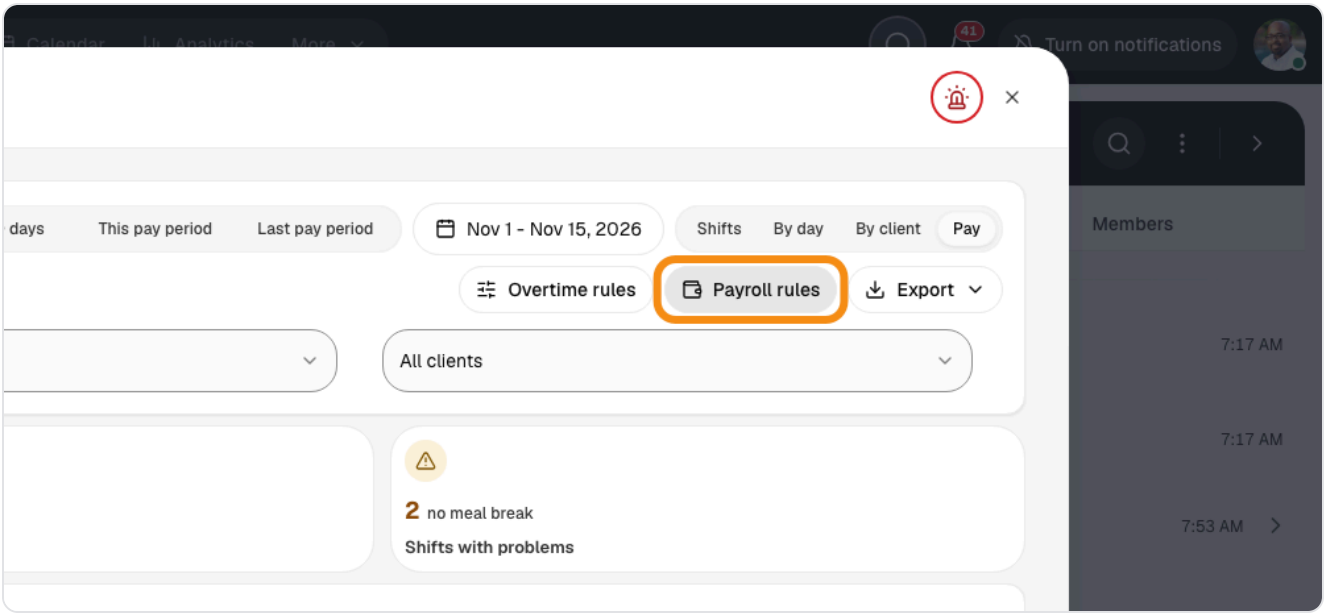
1. Open Team. The Hourly rate column is now there.
2. Click a guard's rate and type it in.
3. To add a Payroll ID (your payroll may need it), a different rate at one site, or a set salary, open the guard and click Edit.



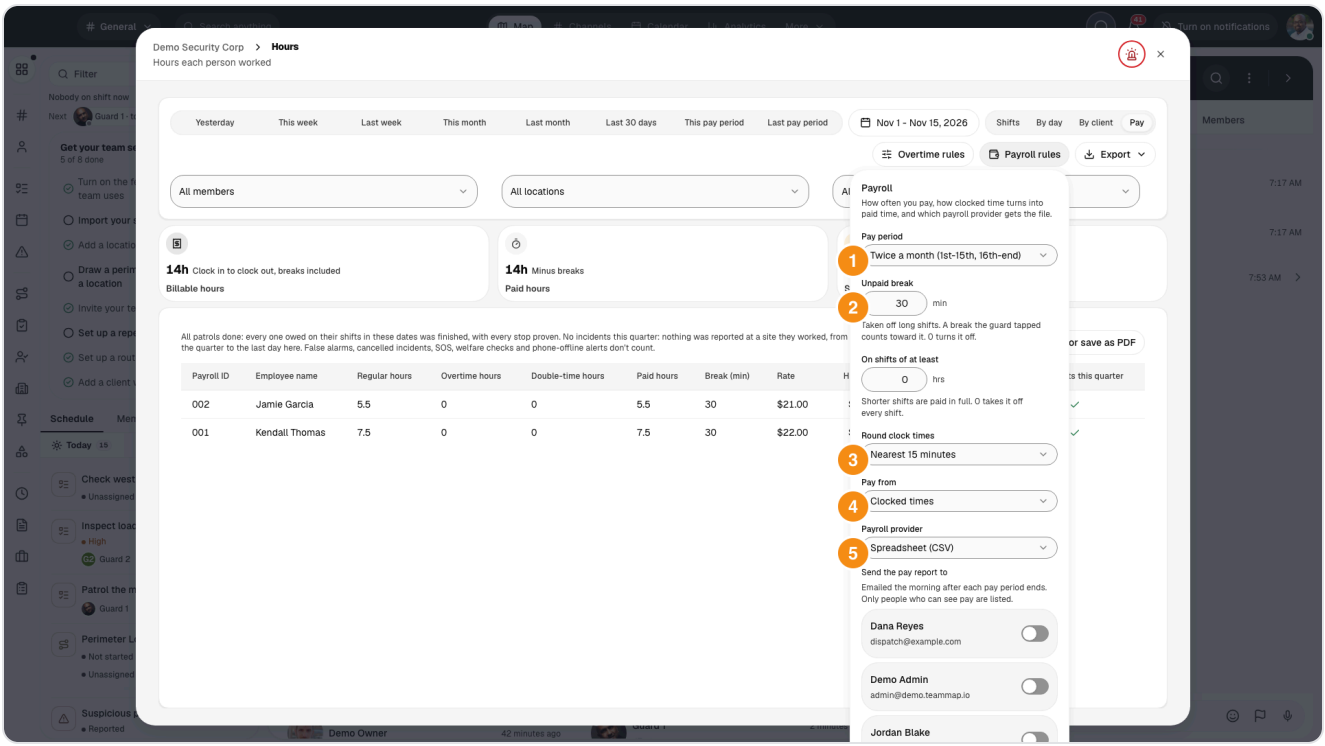
Click a guard's rate to change it.

3 Set your pay rules once

1. Click the grid button at the top left, then Hours. Click Payroll rules.
2. Pick your pay period, how to round clock times, and any unpaid break.
3. Pay from: clocked times, planned times, or clocked times that never go outside the plan.
4. Payroll provider: Spreadsheet (CSV), Gusto or ADP RUN. Click Save.



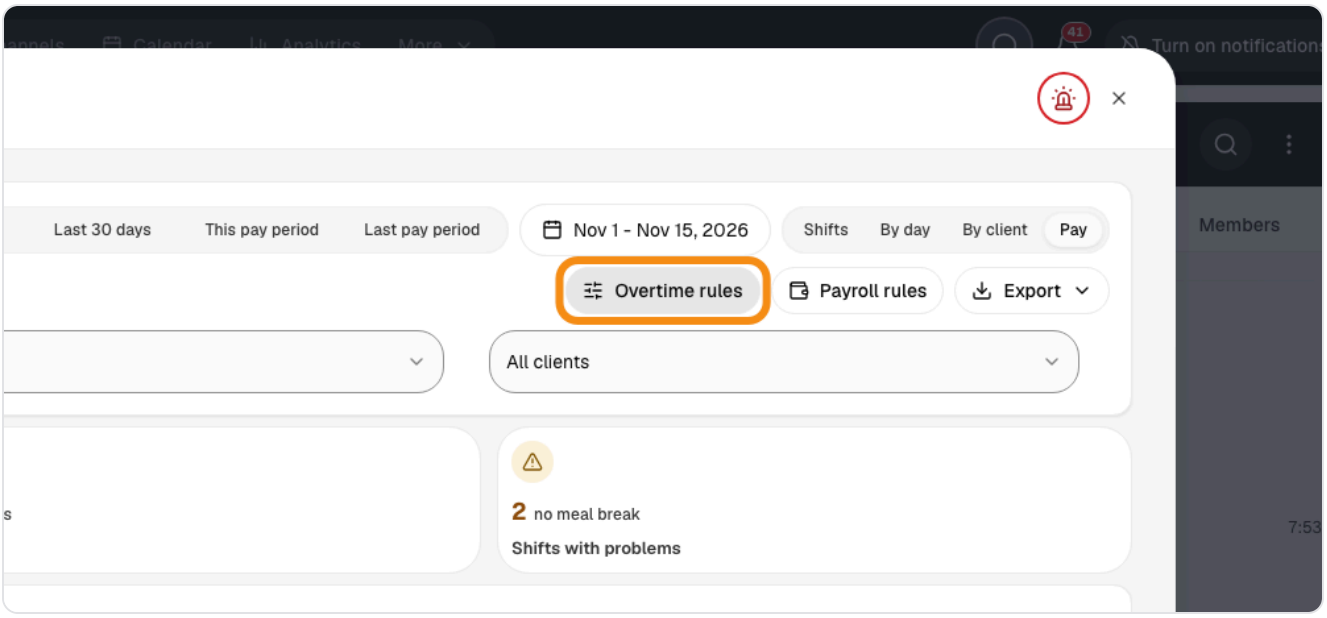
Click Payroll rules.



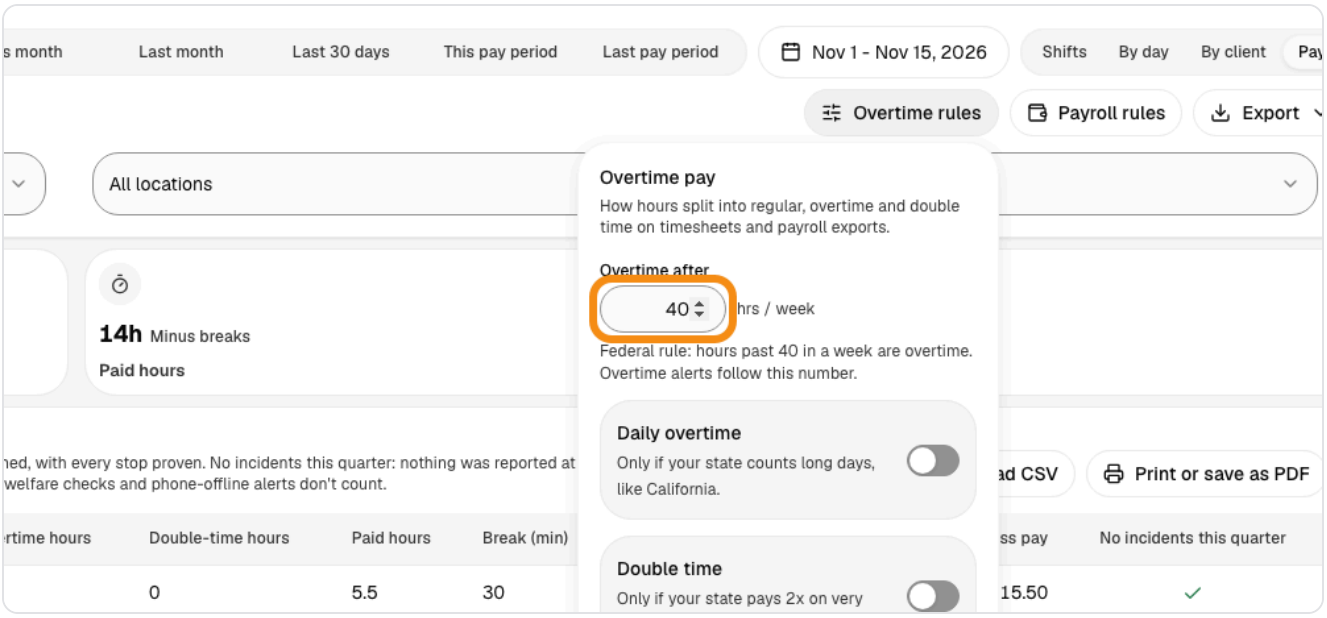
1. **Pay period**: Weekly, every 2 weeks, twice a month (1st-15th and 16th-end) or monthly.
2. **Unpaid break**: Minutes taken off each shift, and on shifts of how many hours or more.
3. **Round clock times**: Off, or to the nearest 5, 6 or 15 minutes.
4. **Pay from**: Which times get paid: clocked, planned, or clocked but never outside the plan.
5. **Payroll provider**: The file your payroll takes: Spreadsheet (CSV), Gusto or ADP RUN.

4 Check your overtime rules

1. On Hours, click Overtime rules.
2. Set the weekly hours before overtime starts. You can also turn on daily overtime and double time.
3. Click Save.



Click Overtime rules.

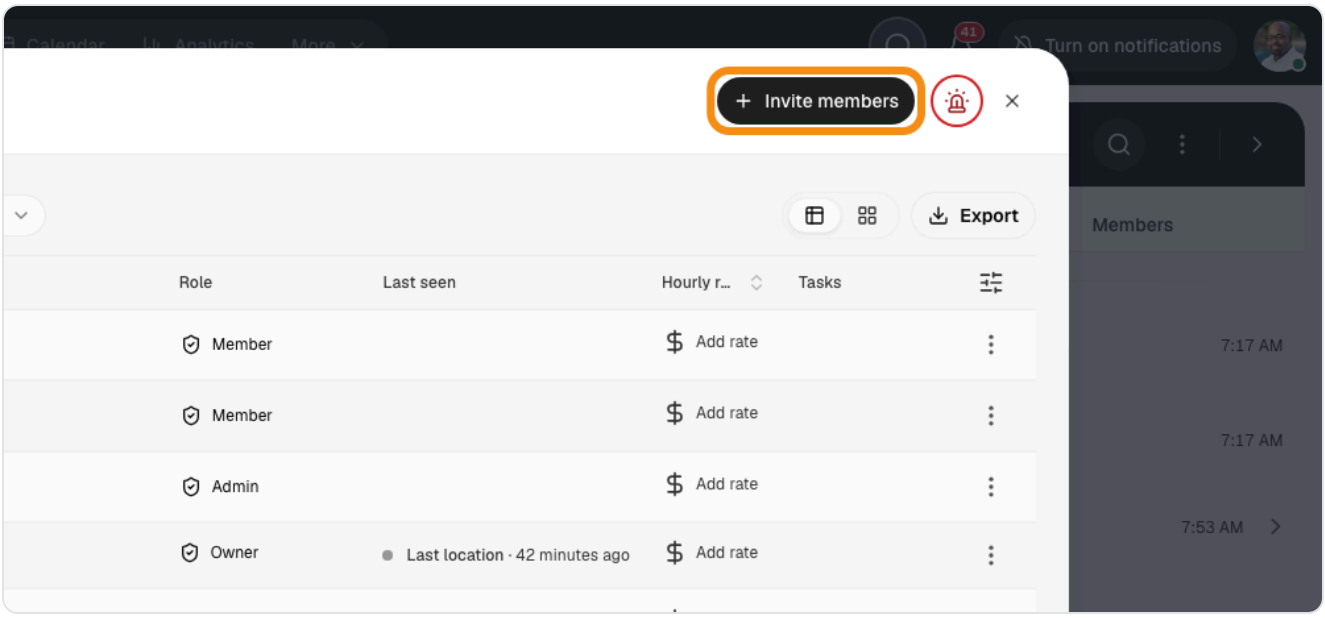


Hours in a week before overtime starts.

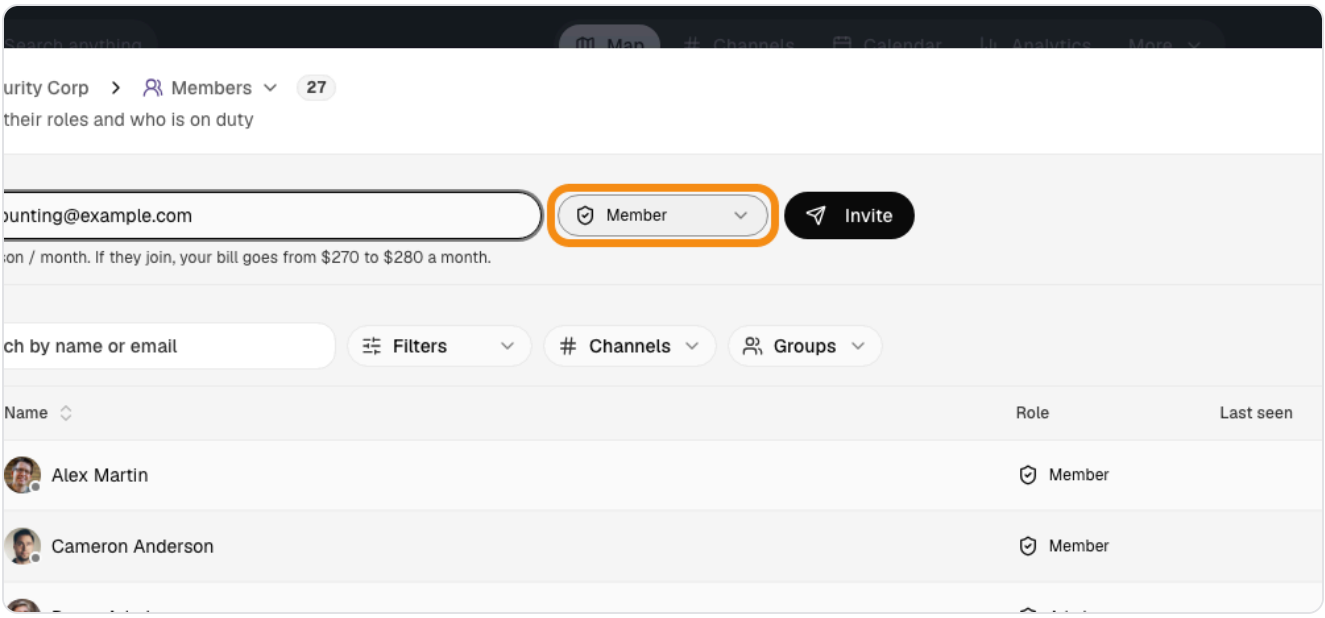
Invite your accountant

5 Invite them on the Payroll report role

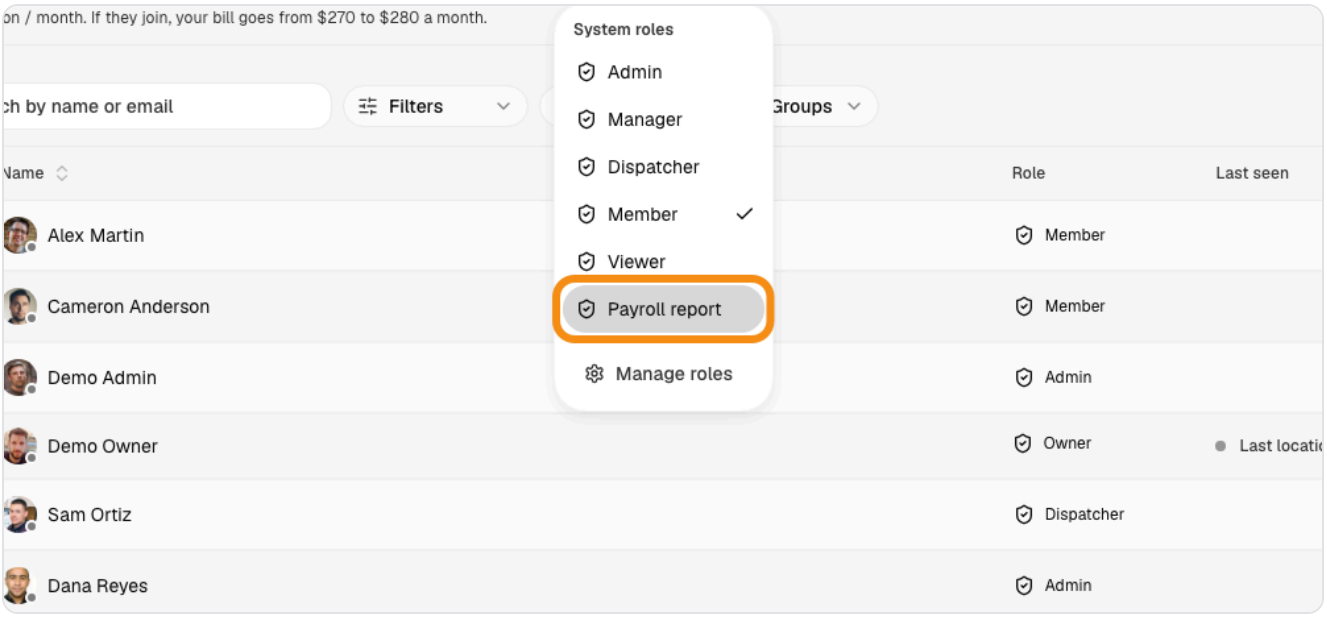
1. Open Team and click Invite members.
2. Type your accountant's email address.
3. Change the role to Payroll report. This role uses no paid seat, so we don't charge for your accountant. If a note says your bill will go up, it goes away when you pick this role.
4. Click Invite. They show as Pending until they accept. Invites last 30 days.



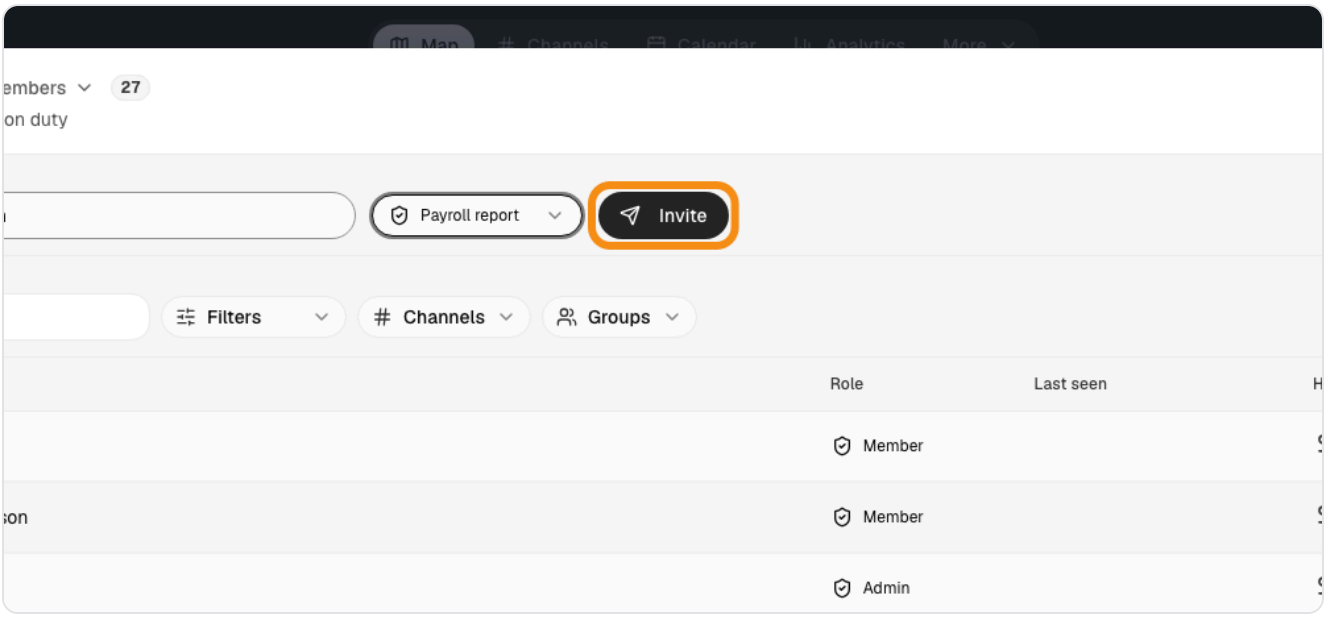
Click Invite members.



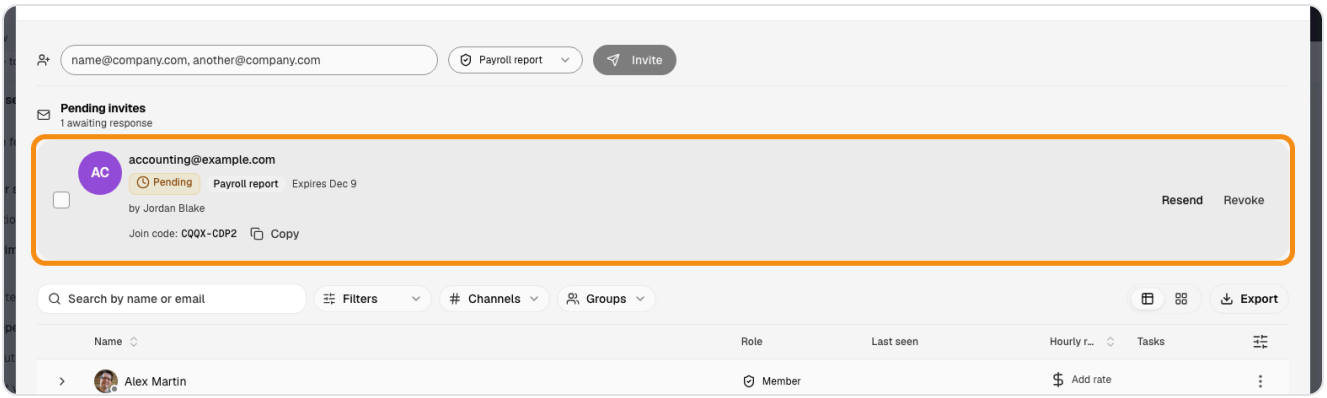
Type their email, then open the role.



Pick Payroll report.



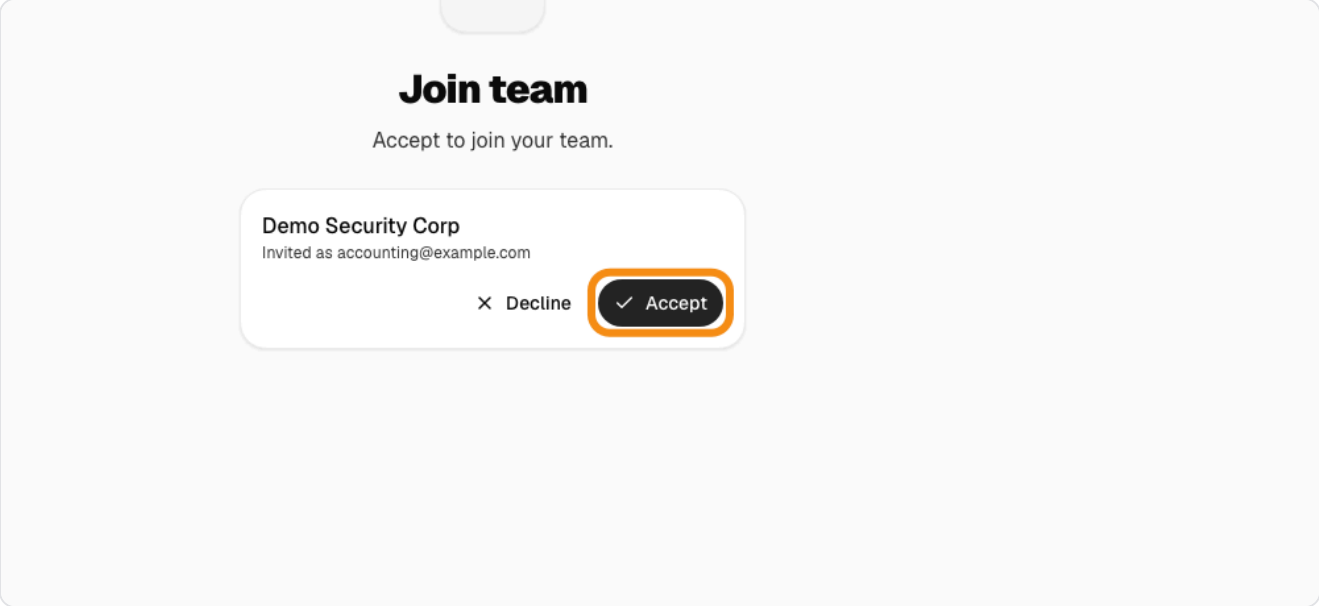
Click Invite.



Pending until they accept.

6 Your accountant accepts

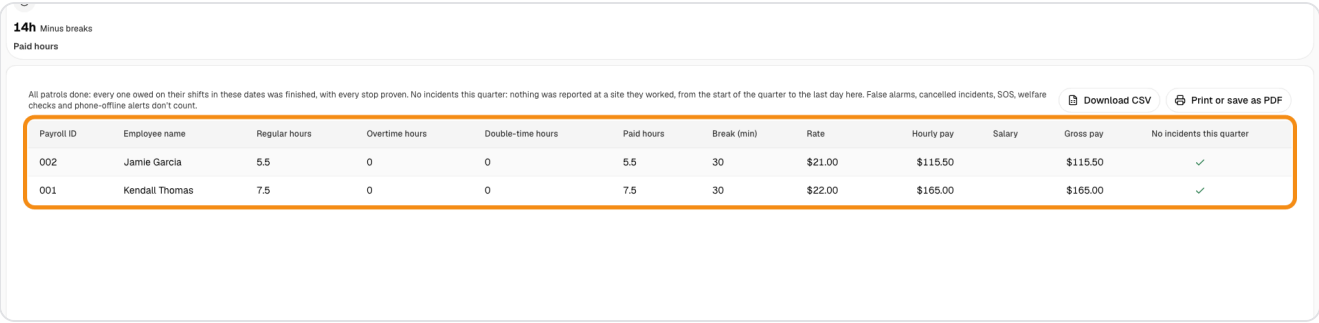
1. Your accountant gets an email from TeamMap with a Join your team button.
2. The email talks about the phone app. Tell them to use a computer instead: go to app.teammap.co and sign in with the invited email.
3. They click Accept and enter their name.



Your accountant clicks Accept.

7 They see the pay report and nothing else

1. After signing in on a computer, your accountant lands on the pay report.
2. They can change the dates and download the files. They cannot change hours or rules.
3. On a phone, they see a note telling them to use a computer.

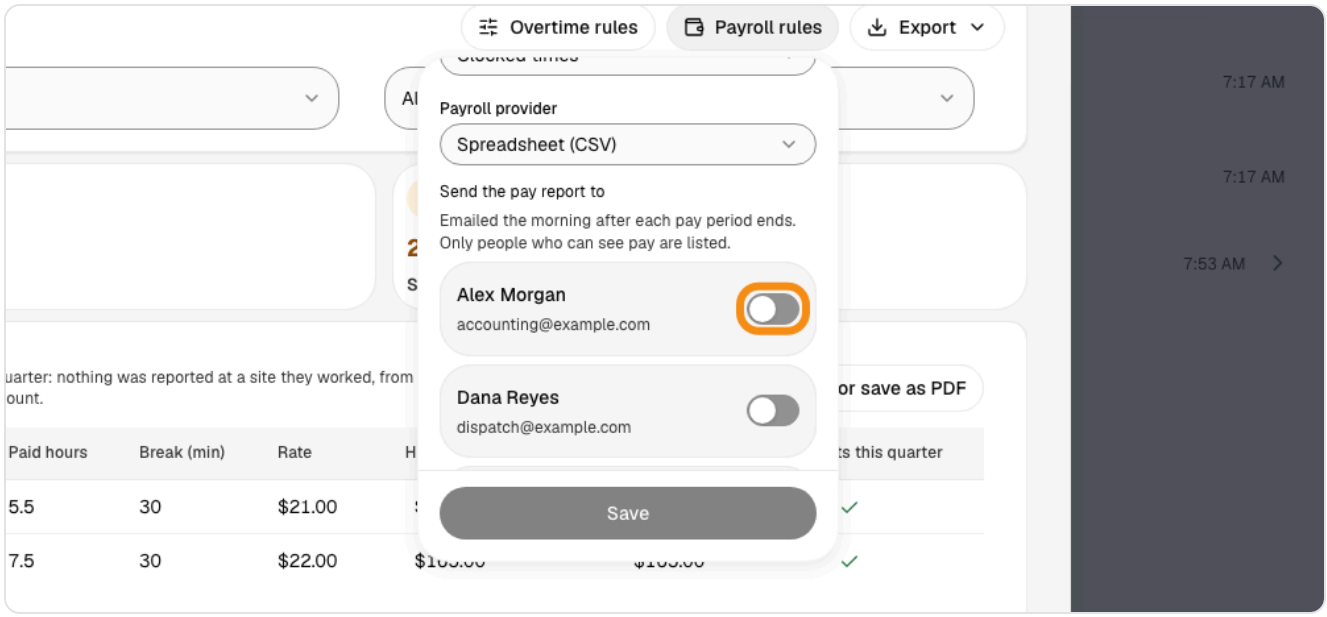


What your accountant sees after signing in.

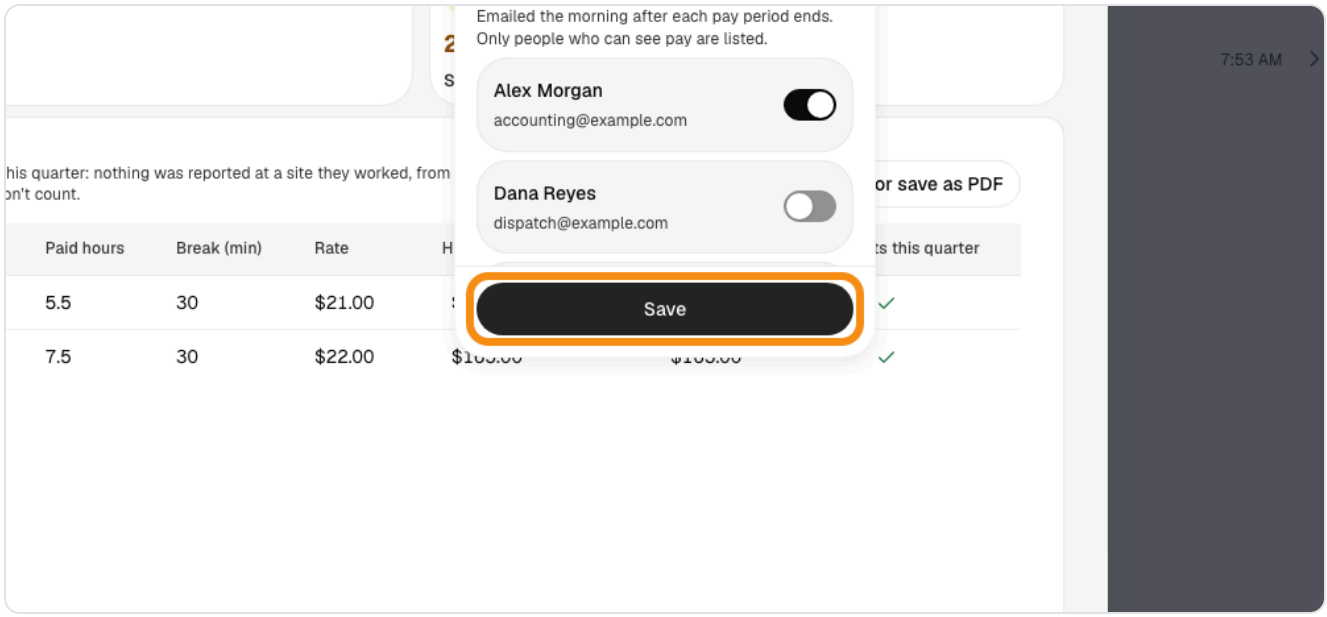
8 Email them the report every pay period

1. Once they have accepted, go to Hours and click Payroll rules.
2. Under Send the pay report to, turn on your accountant. Only people who can see pay are listed.
3. Click Save. The report is emailed around 7 in the morning, your team's time, the day after each pay period ends.

4. The email lists each person's paid hours and gross pay, with a button to open the report. The payroll file itself is downloaded from the report.



Turn on your accountant.



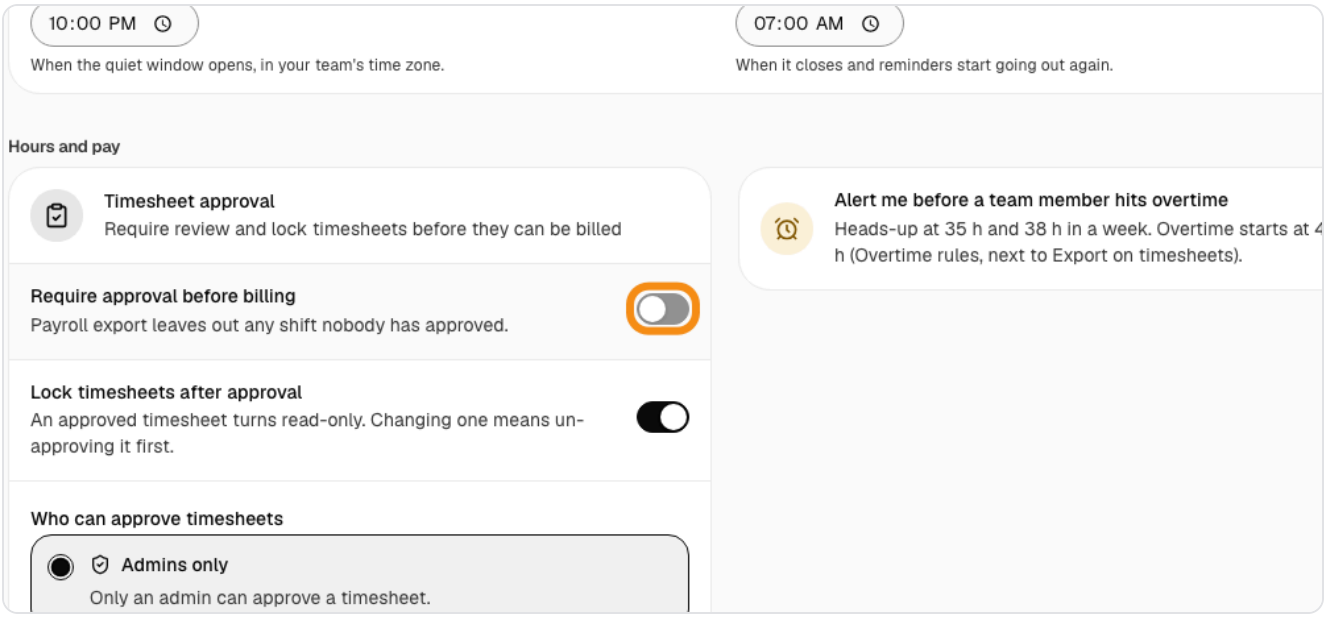
Click Save.

Each pay period

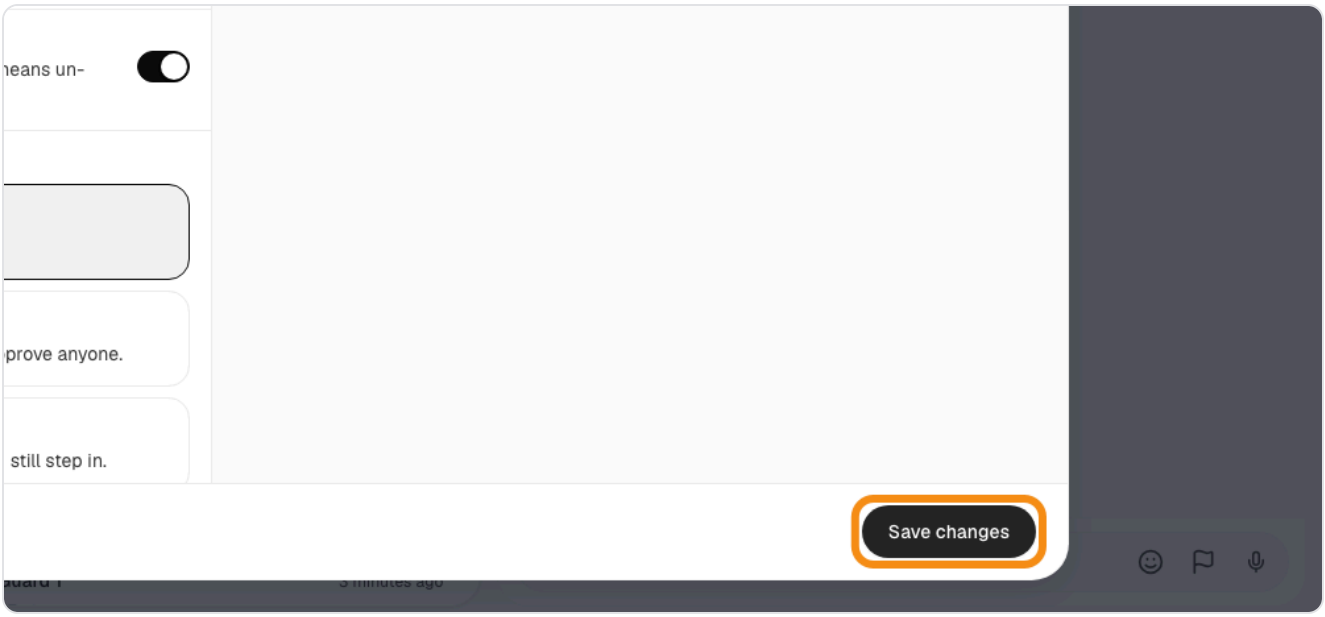
9 Approve the hours, if your team requires it

1. Approval is off unless you turn it on: Team settings > Shifts > Timesheet approval > Require approval before billing, then Save changes.
2. When it is on, only approved shifts count on the pay report and in the files.

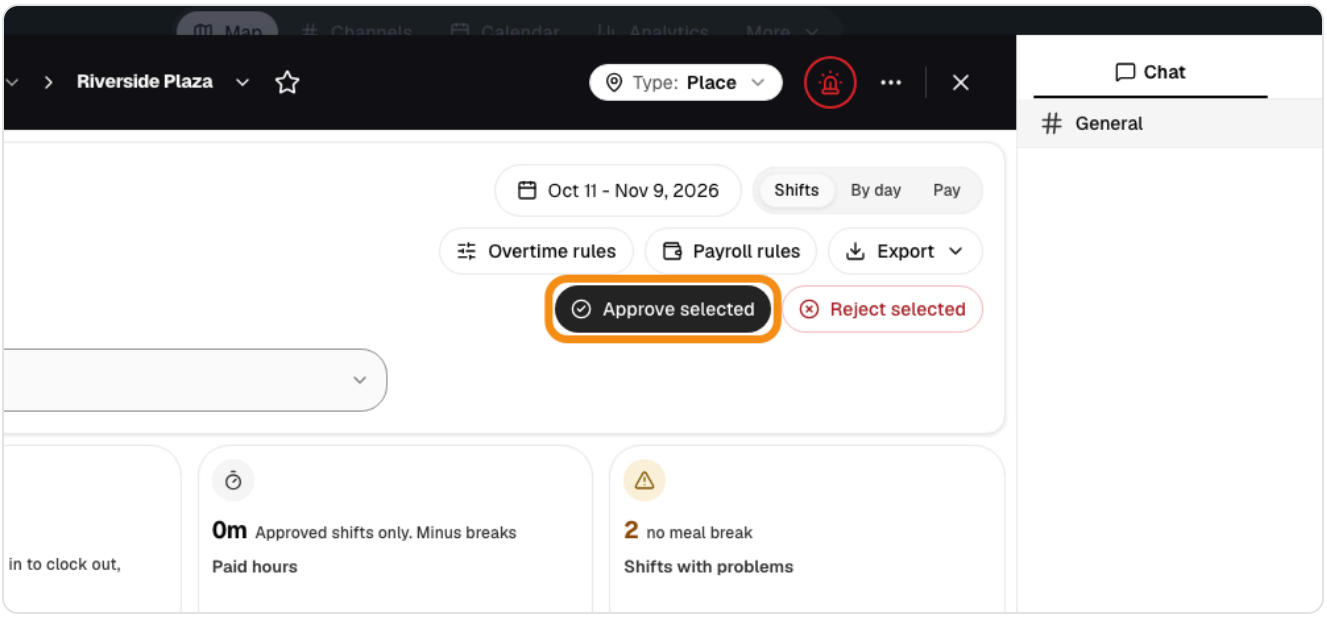
3. To approve: open the site's Hours tab (or Hours), tick the shifts you checked and click Approve selected.



Turn this on to approve hours before they count.



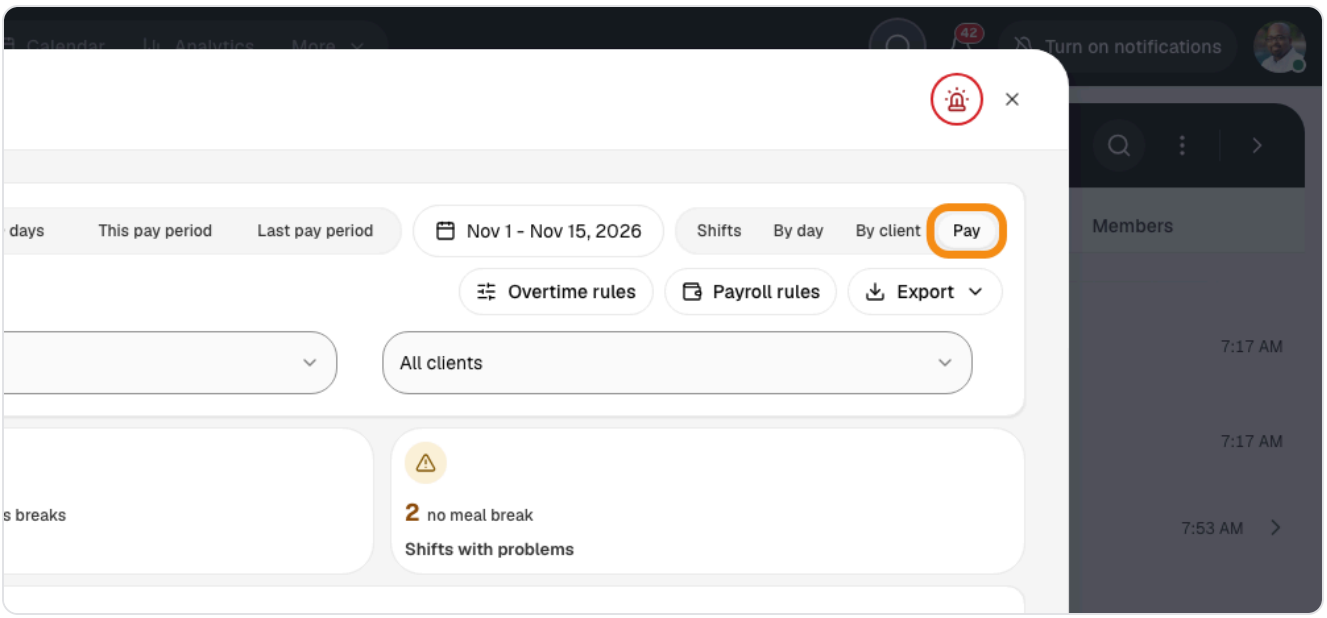
Click Save changes.



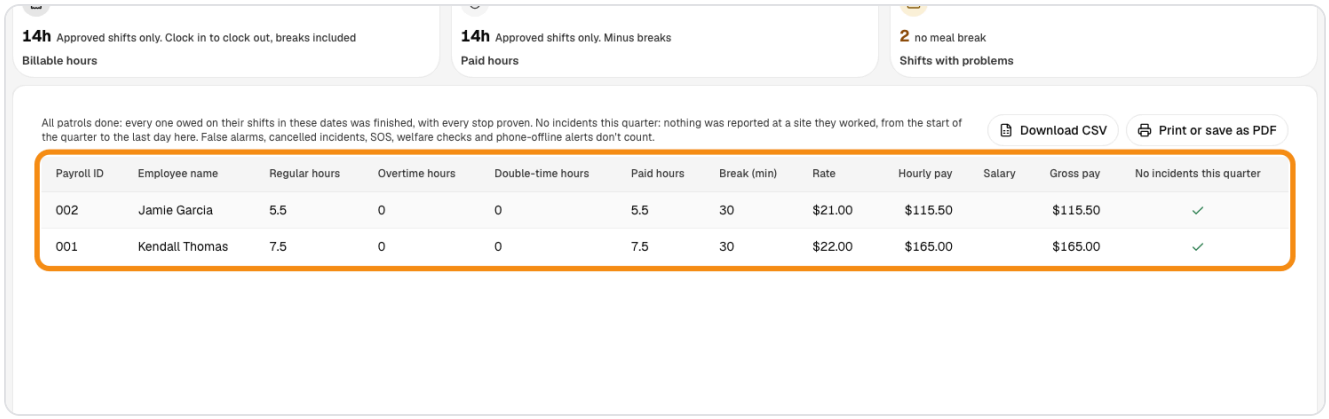
Tick the shifts, then click Approve selected.

10 Open the pay report and download it

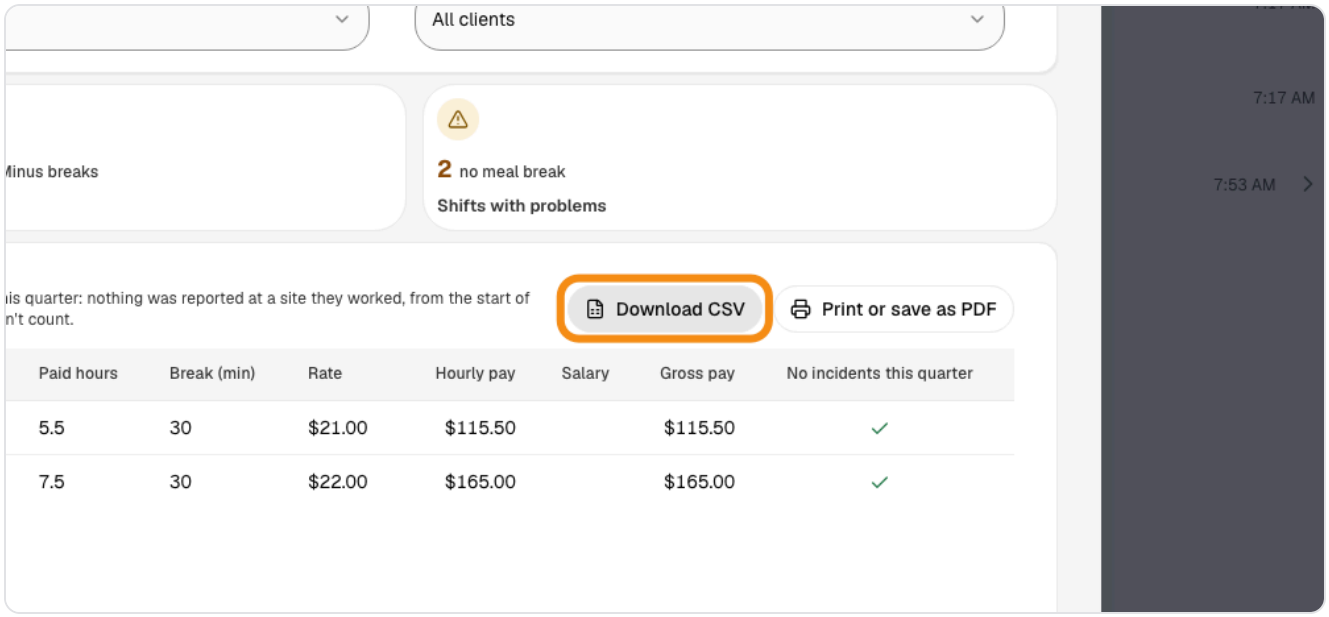
1. In Hours, click Pay. Pick This pay period or Last pay period at the top.
2. Each guard: payroll ID, regular hours, overtime, paid hours, break, rate and gross pay, after your rules.
3. Click Download CSV or Print or save as PDF. Under Export you also get the file for your payroll provider.
4. Your accountant can do all of this from their own login.



Click Pay.



Each guard: payroll ID, hours, overtime, rate and gross pay.



Download CSV, or Print or save as PDF.

Good to know

No charge for accounting	The Payroll report role takes no seat on your plan.
Who sees pay	The owner, admins and people on the Payroll report role. Managers and dispatchers see hours, not pay.
Guards	Each guard sees only their own hours in the TeamMap app.
More than one team	If your accountant already uses TeamMap for another company, they switch teams from the menu at the top of the report.

If something looks wrong

Your accountant is not under Send the pay report to	They have not accepted yet. Only people who have joined are listed.
The report is empty or hours are missing	If approval is on, only approved shifts count. A shift must also be clocked out. The email says how many shifts are not approved yet.
A guard is missing from the ADP RUN file	ADP RUN matches by Payroll ID, so a guard with none is left out. Open the guard, click Edit, and add it.
Your accountant cannot find the invite	It lasts 30 days and goes to the exact address you typed. They must sign in with that same email. You can send a new one from Team.

Questions, or want TeamMap set up your way? Book a demo or contact us, and we will customize your account.

Book a demo | Contact us