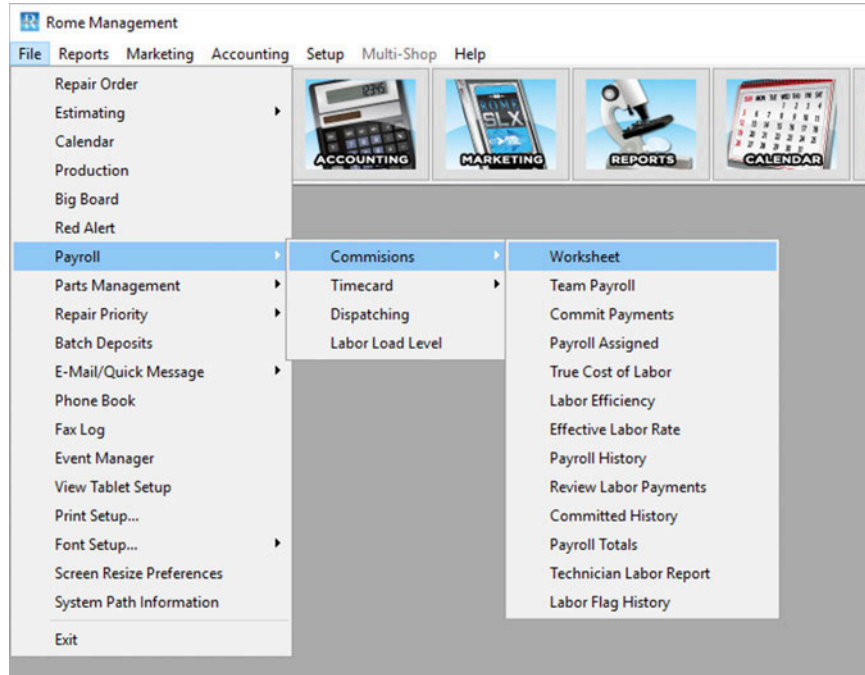# PAYROLL

ROME MANAGEMENT USER GUIDE

PAYROLL

The first step to running payroll is to print out a Labor Worksheet for each tech for pay period. This worksheet shows flagged labor per technician with totals.

1. From the Main Screen, Go to File > Payroll > Commission > then Worksheet.

2. Sort options The date range is the start and end dates of the payroll period. Check the "Include Tasks Without units drawn" box. Select Summary in the Report detail section. In the Technicians section you can select "All" to run all tech sheets with a page break between them or Selected to run one tech at a time. In the last two section select All Tasks and All Jobs.

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3. Go to the Display Options tab and fill it out according to the figure below.


Units to Pay and Cost to Pay should have Show selected all other should be set to hide.

4. The Additional Options is where you can choose to export the report to a CSV file that includes the Complete RO number or the ERA RO number for reconciling to ERA.

Press OK to run the report. Give to reports to the respective techs so they can check it for accuracy. If there are any discrepancies edit the ROs and run the report again. After everyone is happy with the payroll send that copy of the report to the payroll department.

The second step is to commit the payroll. This is very important because it locks the payroll in the system so that you can't double pay the techs.

1. On the Rome Management Main Screen, Click the File menu, highlight Payroll, then highlight Commission, then click Commit Payments.

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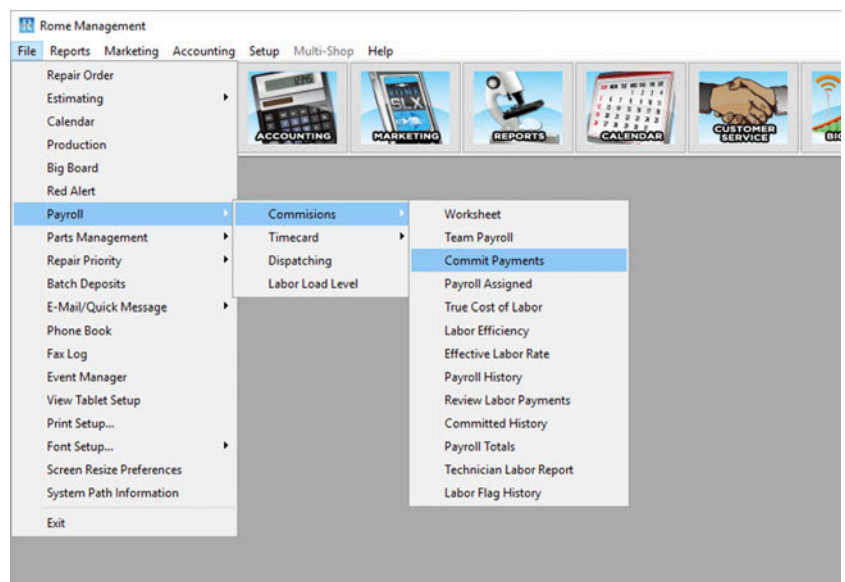
2. The Commit to Pay screen will be displayed.

Commit to Pay

Date Range

Starting Date: 2/03/21   Ending Date: 2/03/21

Select Technician

◉ All   ○ Selected

Payroll Date: 2/04/21   ☐ Print Payroll Worksheet

OK   Cancel

3. You must use the same date range as you did in the worksheet in step 3 above.

4. You can run it for all techs or run them one at a time. If you want to just do one tech put the dot in Selected and put the techs name in the field.

5. Select a Payroll Date. This is the date that all these transaction will be recorded as a cost. When you run a payroll history or a Work in Progress report all the transaction in this payroll will have this date. We recommend you make this date the last day of the pay period so it is easier to remember.

6. If you check the Print Payroll Worksheet box it will print a payroll worksheet. However, it will be all zeros because all of the labor has just been committed, so it is unnecessary.

7. Press OK and the payroll will be committed. You should see the labor lines in the specific ROs turn yellow or green.

TEAM PAYROLL

This report is the same as the payroll Worksheet except it groups the report by team instead of by tech.

PAYROLL ASSIGNED

This report will show how many units your techs have assigned to them so you can load balance the shop techs.

Units Assigned Display - In this section you define what you want to see on the report.
Total Units Assigned(including Units Completed) will display all of the units assigned to the techs even if the line is completed and paid.

Total Units - Units Completed (Flagged and/or Committed) will display Units assigned minus Units Com Completed. Run this option when you want to find out how much work is assigned to the tech that has he still needs to do.

Total Units - Units Committed (Result Includes Flagged Units) will display units assigned minus units that have been committed. This option will give the units that have been assigned and flagged but not the units that have been committed.

Units Paid - In this section you choose whether you want the Units Completed displayed on the report.

Date Range - Select the date range you are interesting in. Any RO that has a Date Due that falls within the range you select will be displayed.

Vehicle Location - Choose whether you want to display cars that have been marked In Shop or not.

Report Detail - Choose to run a Detail or a Summary report. A detail report will give unit totals for each RO the tech is assigned to; the summary will just give the total units for each tech.

NOTE: If you have any ROs that have unassigned labor they will show up on the first page of the report as Unassigned Tech

TRUE COST OF LABOR

This gives the sale and cost of labor by technician so you can see what your profit margin is for each individual technician.

LABOR EFFICIENCY REPORT

If you have your commission techs clock in and out of jobs through the Tech station you will be able to run this report to find their efficiency of actual to commission hours. If you tech do not use the time clock feature this report will not be of any use.

EFFECTIVE LABOR RATE

This report compares the revenue dollars to units to come up with average labor rate for the repair and each of the labor accounts.

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PAYROLL HISTORY

This report will display the payroll that has been committed.

Sort Order - Select if you want the report sorted by technician or RO.

Date Range - This is the date range you want to run the report for. Any committed transaction with a. Date paid in this range will be displayed. The Date Paid for a transaction is whatever the Payroll date you entered when you committed it. For instance, you committed payroll from the 1st to the 15th and selected the 16th as the payroll date. If you run the payroll history report from the 1st to the 15th, none of the transactions will be displayed. If you ran the history report from the 16th to the 16th all of the payroll transactions would be displayed.

Technicians - You can select a specific tech to run the report for, or all of them.

Repair Orders - Here you select if you want to just see open ROs, closed ROs, or both. Completed Jobs just display transactions on closed ROs. Works in Progress will display transactions on ROs that are still open.

Details to Print - This is where you can choose how much detail you want displayed on the report.

RO Line Detail will display each line that the tech was paid on.
RO Subtotal will display a subtotal of each RO for each tech.

Pay Date Subtotal will display a subtotal for each different Pay Date for each tech.

Technician Subtotal will display a subtotal for each technician. Checking the Page Break box underneath this will force the next technician to be displayed on a new page.

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REVIEW LABOR PAYMENTS

This is used to look over the transactions that have been committed and to un-commit them if you need to. When you click it will first ask you to enter a date range. Enter the date range you are interested in displaying. See the Payroll History report above to see how this date range works. When you hit the OK the Labor Payment History window will be displayed.

Date Range - If you want to select a different date range then the one you entered in the previous screen you can do so in this area.

By default the transactions will always be sorted by Pay date. You can select the By RO or By Technician if you also want to sort by RO number or technician.

If you need to un-commit payments you can check the boxes to the left of the transactions to select them. When you have all the transactions you want selected, press the Commit Trans Cancel button and the transactions will be uncommitted. You can use the other button to help you select the transactions. Tag will select the highlighted transaction, Untag will unselect it, and Flip will unselect it if its checked and select it if its unchecked.

Committed History - This report is similar to the Payroll history report but it includes the date that the commit to pay was done. This helps if you can't remember the payroll date you selected when you ran the commit to pay but you do remember the actual day you did it.

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