HOW TO RUN PAYROLL PROPERLY

4

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HOW TO RUN COMMISSION PAYROLL PROPERLY

Payroll begins when RO's are created, and labor is assigned for Blueprint. It continues as supplements are imported to the RO's. Rome automatically assigns any new Est/Suppl labor to the tech or team that has been previously assigned to the majority percentage of that labor account. As the Big Board production tasks are marked completed by the Technicians, Rome will "auto-draw" 40% of the body labor at Disassembly, another 10% when the Body step is complete and the final 50% when Reassembly is marked completed. Frame and Mechanical are 100% auto-draws when marked completed. Of the four-paint labor steps; Cut-In, Prep, Paint and Buff, only Paint pays the painters 100% when completed. This means that on the last day of the payroll period you will only need to print the payroll worksheets, make any adjustments, and then Commit the payroll before updating to your paycheck process.

Payroll Dates:

Rome does not automatically lock your payroll period like DMS systems, so it is important to choose your starting and ending dates for your reports carefully. If you work on a weekly payroll then make sure you choose an entire week for your reports, including the weekend. This is important in case a Tech uses the Rome Easy Technician app to update their Big Board on a weekend day or if the Technician works on Saturday. It is also important to use the last day of the previous pay period as your starting date for your next payroll process. This is important as a Tech may update their Big Board using Rome Easy Technician AFTER you committed their previous pay period.

Commit to Pay by Selected Technician:

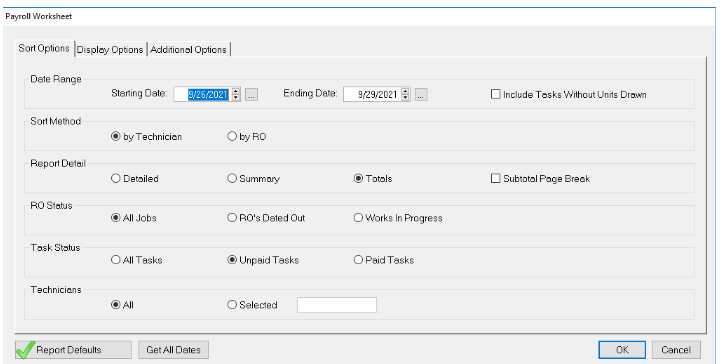
The Commit to Pay process must be performed individually by "Selected" Tech to ensure that the payroll units do not change AFTER their reconciliation meeting on the last day of payroll.

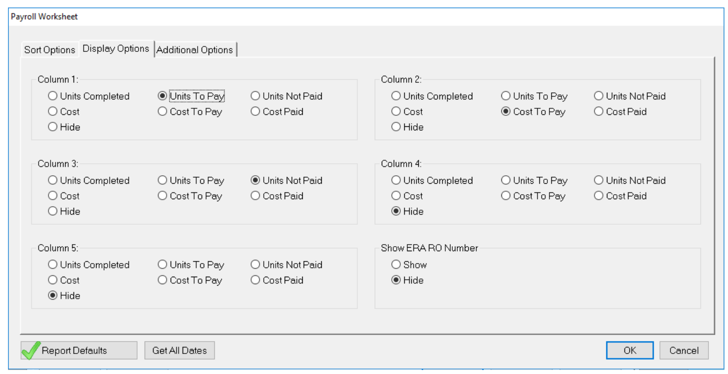
1 PRINT THE PAYROLL WORKSHEETS

Go to FILE – PAYROLL – COMMISSION – WORKSHEET AND/OR TEAM PAYROLL.

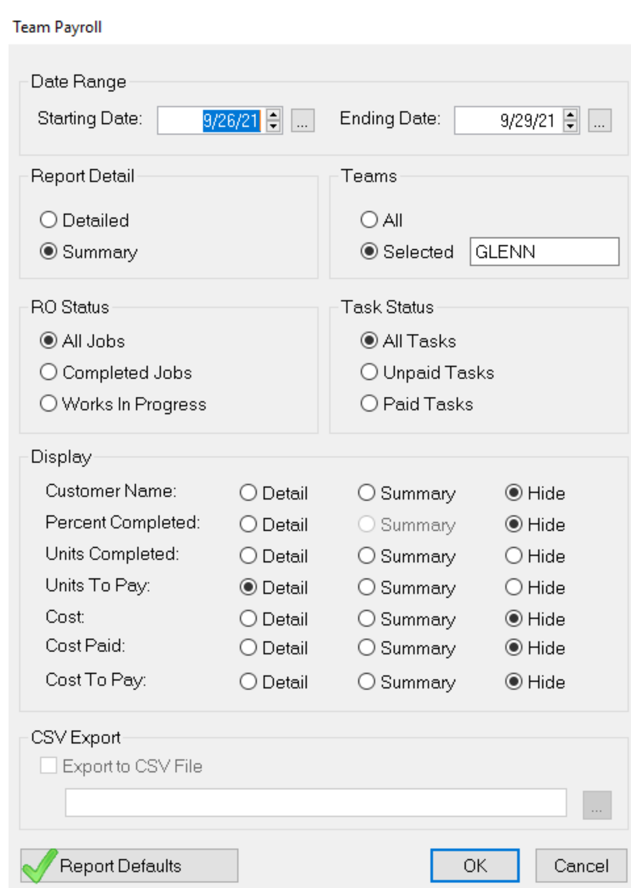
See the "NOTE" at the end of this document to setup and view a "Toolbox" that allows quick access to the payroll functions.

Print the Payroll Worksheets / Team Payroll reports in the morning on the last day of payroll and give to the Technicians to review on their own. The Technicians can then compare the Payroll Worksheet to their own records and make notes on any questions. This report can be run at any time during the payroll period as requested by the Technicians. If your shop operates on a bi-weekly or twice per month payroll then this can be provided to the Technicians on the "middle" week of payroll so that any problems can be corrected in a timely manner. The WORKSHEET report will print each individual technician that has payroll present in the selected current payroll period. Choose the starting date of the report as the first day of the current payroll period and current date as the ending date.



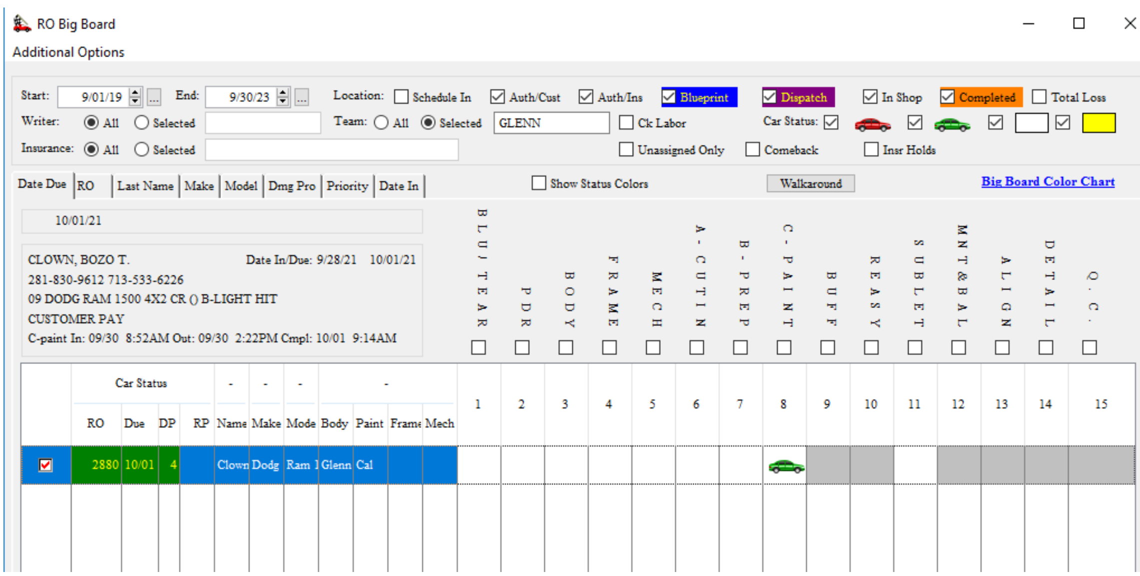


If your shop has "TEAMED" technicians (Two techs are setup as a Paint team with each team member always receiving a fixed percentage of the team hours) then print a TEAM PAYROLL report for the individual team as that will display total TEAM hours. This will simplify the total Team hours per RO compared to the Shop RO's and/or estimate/supplements that the Team was provided. Note that the payroll worksheet listed above will print each TEAM members individual hours and individual commission pay based on their team percentage split.



2 RECONCILE HOURS WITH TECHNICIAN

Each Technician will individually review and approve their payroll. It is recommended that a manager perform this task to ensure that Technicians are not flagging ahead of their work performed.
It is helpful to review the Tech's current open RO's during this reconciliation. Go to the Big Board and Filter the list by choosing "Selected" next to the Technician box, type the Tech's name in the box and hit the "Tab" key. This will filter the list to only that Tech's open RO's.



Typically, the Technicians will ask the following questions:

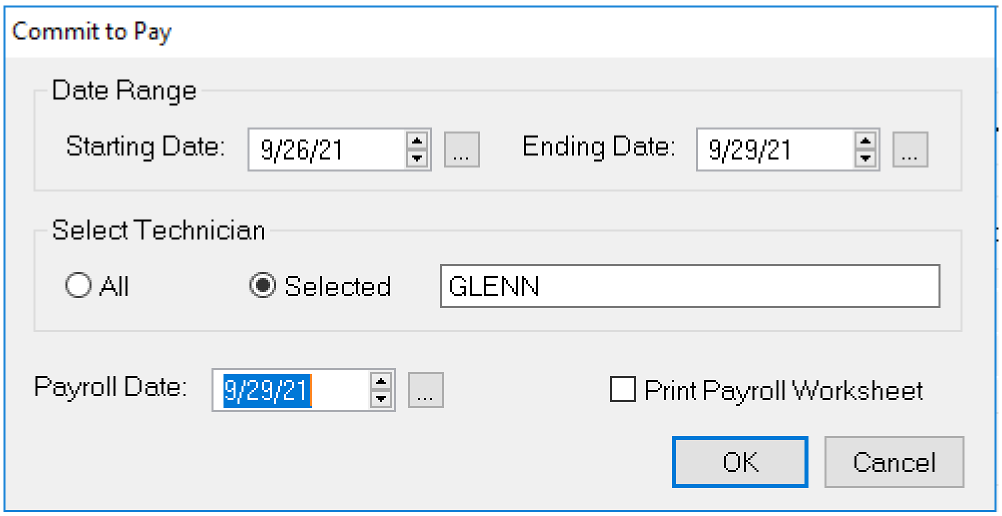
1. **Did I get paid on this last payroll?** You can re-print the payroll history report for the previously committed date range for this Technician. You can also see "green" dates to the left of labor lines with the previously committed payroll date.

2. **I don't want to take any time on this RO since it is only Disassembled.** Go to the RO, then the labor button and "Unassign" the labor by Technician or Account code. The "Unassign completed, not paid" check box must be selected to remove the Disassembly draw from the current Payroll Worksheet. You MUST then "Assign" the Technician back to the labor so that it will be paid in the next period.

3. **I want to draw more time from this RO.** The first question is whether the time is justified based on the work performed. Go to the RO, select the Labor button, and then highlight one of the Tech's lines. Click on "Draw" and then enter the number of "Units" that you agree to draw. ***Remember to check the "Draw Date" in this box to ensure it is in the current payroll period. To temporarily lock this date simply click on the "Date" box at the lower left and this date will be presented on any further draws performed. This setting clears once you logout and log back in, the default is always current date.

4. **There should be more time on the RO.** Body Techs commonly look only at the total body labor hours on the estimate. This can be misleading due to body labor hours that were assigned to the painters or body written hours that were moved to sublet for glass or mechanical. Reprint a Shop RO document to compare to the estimate/supplement.

5. **What time is left on this RO?** Go to the RO, click on the "Labor" button, and then click on the "Draw" button. Select the Tech's name and then Account code and click on Ok. This will present the hours remaining to draw and list the "Paid" hours to the right. Do not click Ok unless you intend to draw the remaining balance, just click "Cancel" after noting the remaining units to draw.



3 RE-PRINT THE PAYROLL WORKSHEET

Go to FILE – PAYROLL – COMMISSION – WORKSHEET AND/OR TEAM PAYROLL.

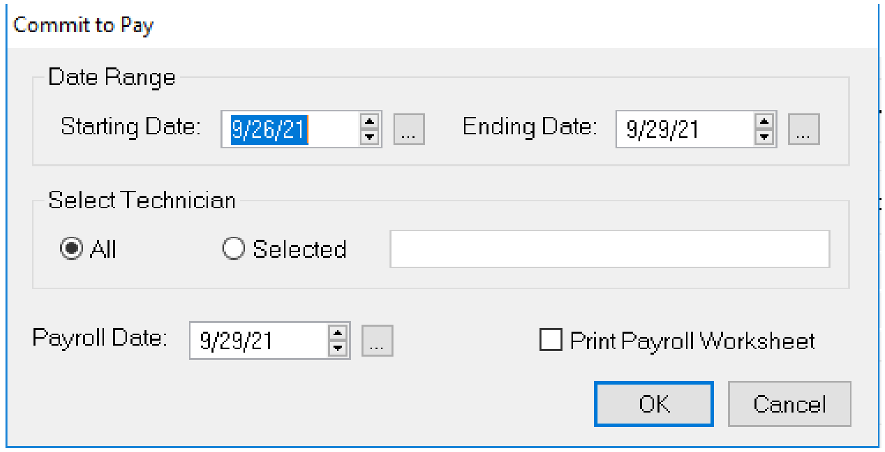
Print the Payroll Worksheet for the individual Technician to ensure that the changes made in step #2 are correct.

This step is to ensure that the worksheet did not change after each technician reconciled and approved their hours.

4 COMMIT PAYROLL AND PRINT PAYROLL HISTORY

Go to FILE – PAYROLL – COMMISSION – COMMIT PAYMENTS

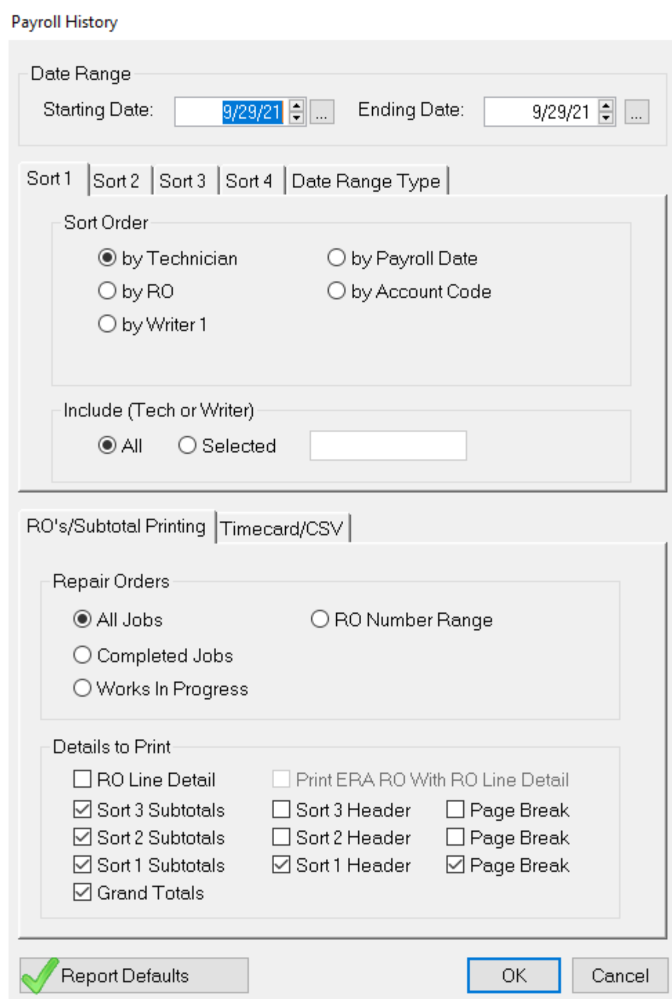
Enter the starting and ending dates of your current pay period. In the Payroll Date box, enter the last day of pay cycle. Leave Print Payroll Worksheet unchecked. This will lock all the pay amounts in the payroll period to ensure that no changes can be made. Make sure you commit the payroll by “Selected” technician to ensure that the payroll does not increase AFTER the reconciliation with the Tech.



Go to FILE – PAYROLL – PAYROLL HISTORY

This step will print the FINAL version of payroll to submit to accounting or your payroll service. Print this report for “All” Techs as a complete payroll period. **NEVER SUBMIT THE PAYROLL WORKSHEETS TO ACCOUNTING. ONLY USE THE PAYROLL HISTORY REPORT.**

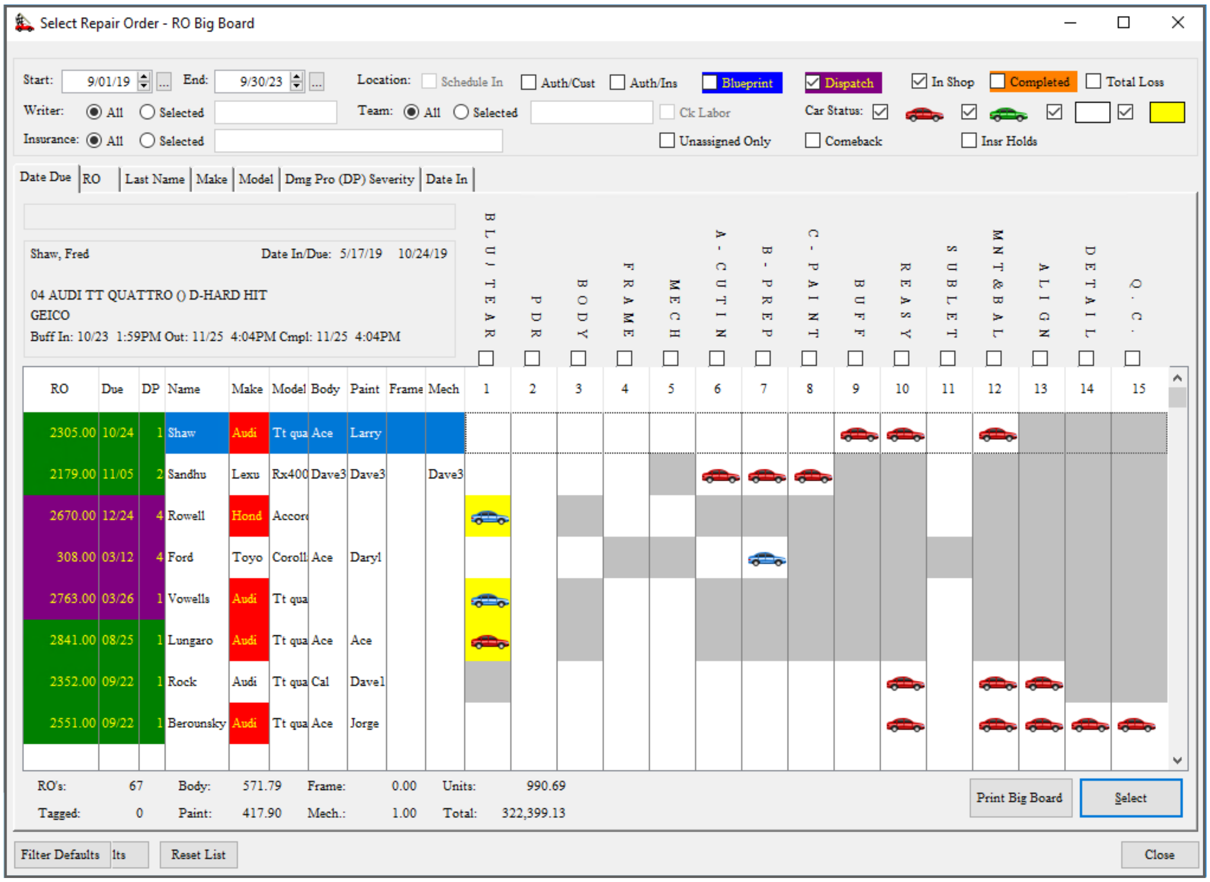
Many shops use a summary spreadsheet or form to submit payroll. This allows the additional entry of paid time off, vacation or sick days. These additional entries should NOT be entered into accounting as a cost of labor transaction but entered as fixed costs.



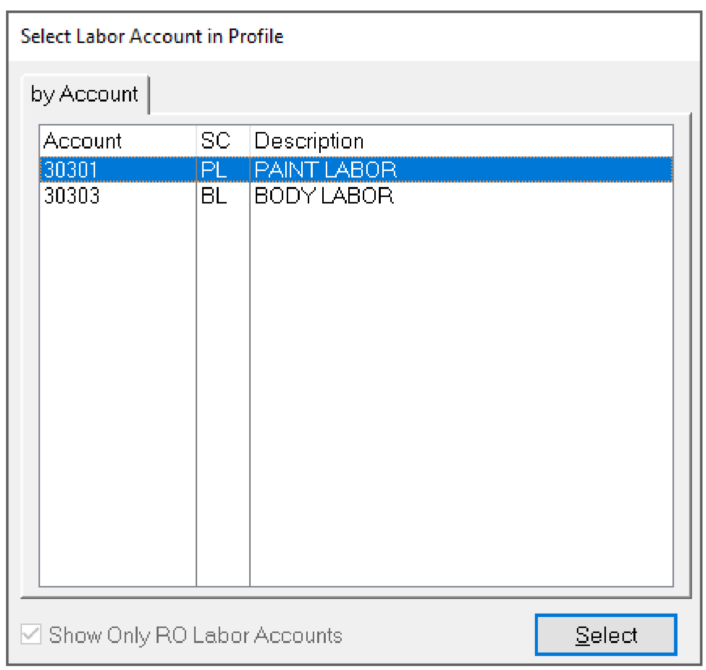
NOTE: The Rome system allows each individual user to create their own personal “toolbox” of commonly used functions. To create the “toolbox” simply hold the “Ctrl” key on your keyboard while clicking on a function. This is extremely helpful to create quick access to the “Payroll” cascading menu features. If your toolbox is not on your display, click on “Setup” at the top of the main program and then click on “View Toolbox”. There is also a separate Rome Socrates Knowledge base entry that describes the Toolbox setup and use in detail.

1. TIMECLOCK ENTRY - TECHNICIANS

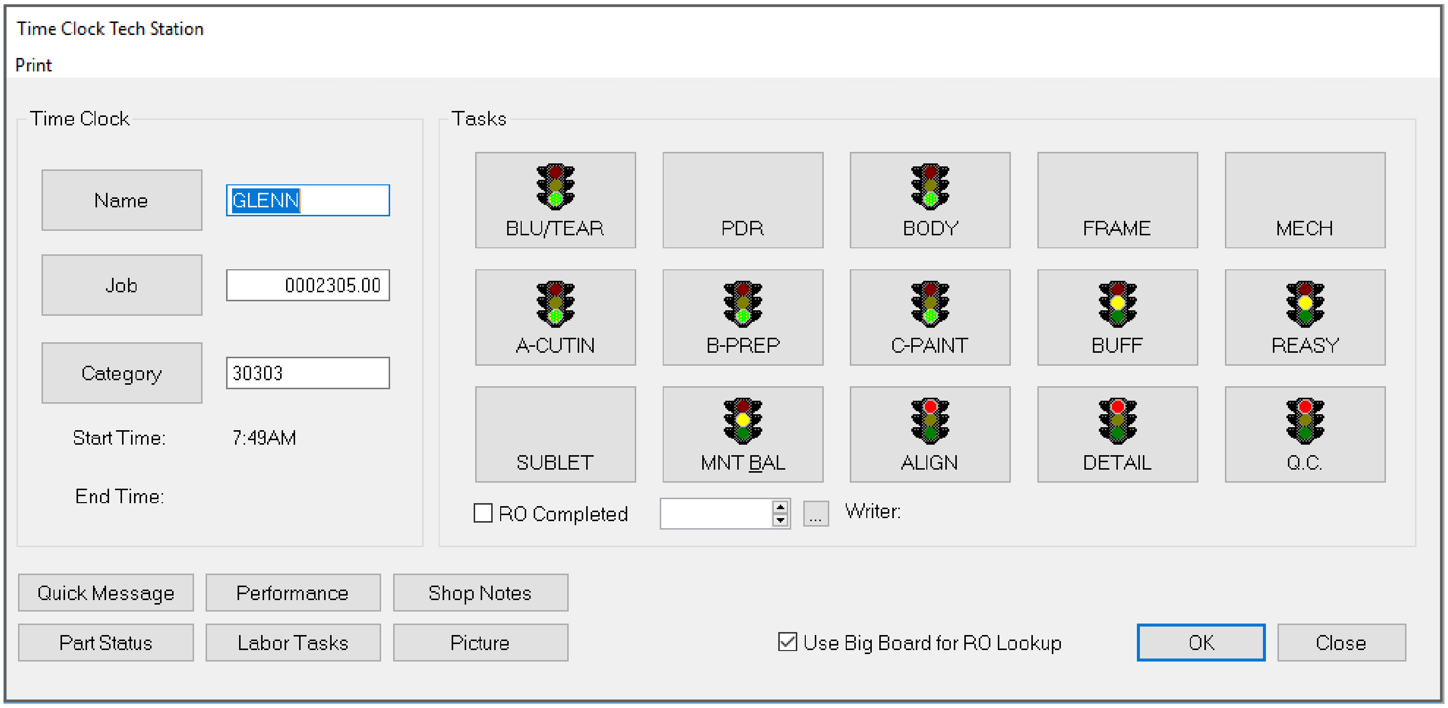
Timeclock payroll in Rome begins with the technicians logging their “real-time” work against Repair Orders by using the Rome Time Station program. This program is only available on a PC computer and can be installed and setup by calling 1-800-373-7663. These computers should be accessible in the shop and should be both convenient and installed in multiple locations. This program simply asks for a username and password and then presents a Big Board screen to select RO’s to work on.



By selecting an RO from the Big Board list a prompt will ask the tech to select which labor account (body, paint, frame, mechanical) they are working on.

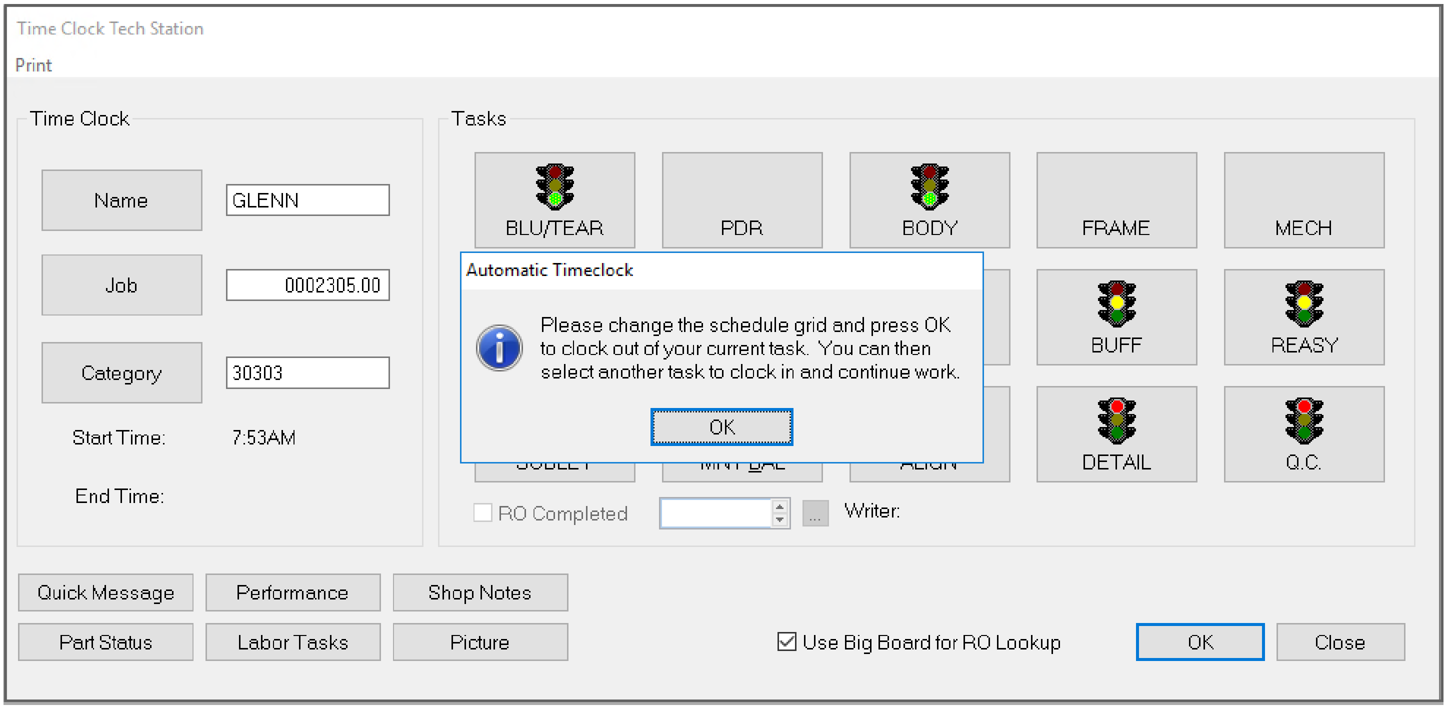


The technician will then see the Big Board traffic lights where they can “click” to yellow the step they are currently working on or update previously completed steps to green. It is important for the tech to note the “Start Time” entry at the lower left to confirm that they are starting their time on this RO and then click on “OK”.

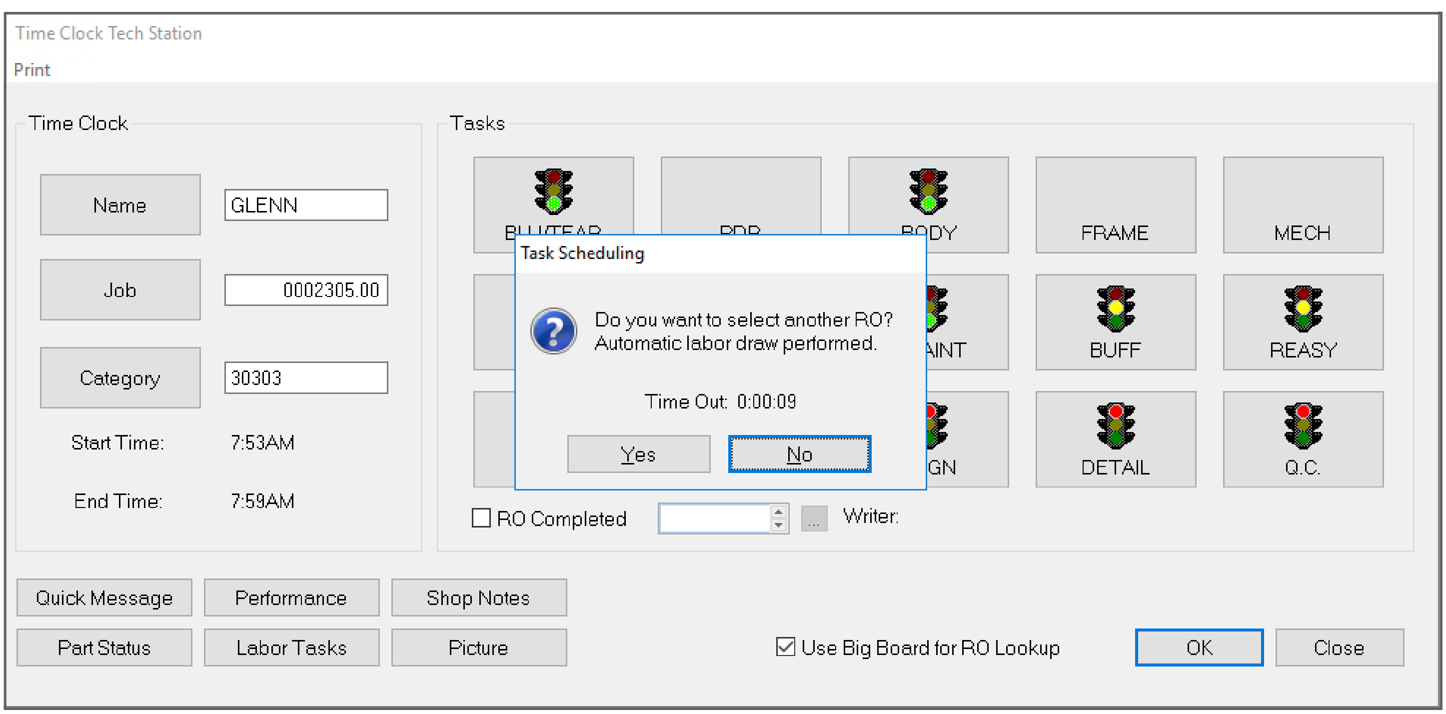


This will return the Time Station program to the main screen and the next tech that needs to use it just needs to click on the “Time Station” button at the upper left to login.

At the next login by the tech, the Time Station will display the Big Board traffic lights for the RO they are logged in on and then prompt the tech to change the schedule grid and press Ok to clock out of the scheduled task. It is important for the tech to note the “End Time” at the lower left of this screen to confirm that they are logging off the RO.



A new box will appear asking the tech if they want to select another RO. This box is on a 20 second timer. If they answer “Yes” then they will return to the Big Board list to select another RO. If they answer “No” then they are logged out and are not assigning any of their time to an RO. If they simply walk away without responding, then the 20 second timer will count to zero and then return the Time Station to the main screen for the next tech to use.



The Technicians must understand that these time entries produce their weekly Timecard report that is used to create their paychecks. Mistakes made during their timeclock entry will result in mistakes in payroll.

Below are common questions that the Technicians ask about this process:

- **Can I be logged into two RO's at the same time?**
  No, the system is designed to track their time to one RO at a time. It is logical that a technician may briefly go back to another RO to check on something but if the time spent logging off one RO and then back to another is more than the time spent checking the other RO it is unnecessary.

- **Is the Rome system going to penalize me for time spent on a single RO?**
  While that measurement exists, the data should always be viewed by management in an overall average perspective and must include consideration for estimate quality, proper tools, and technician training.

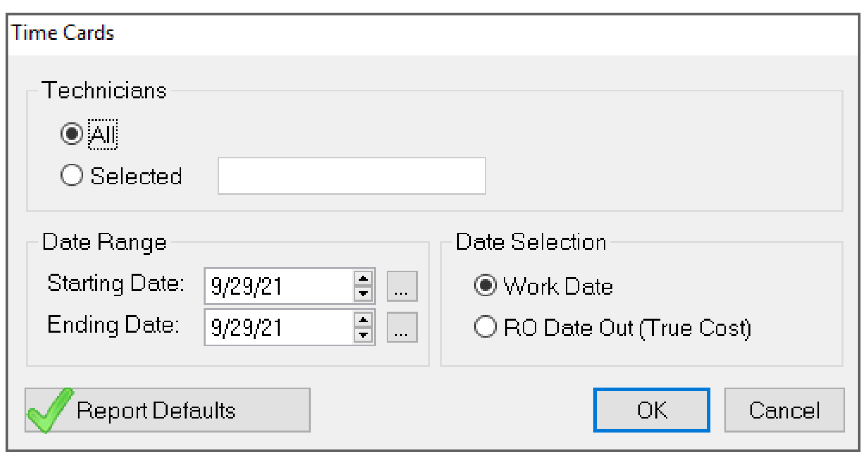
2. TIMECARD REVIEW – OFFICE STAFF

See the second "NOTE" at the end of this document to setup and view a "Toolbox" that allows quick access to the payroll functions.

Every day an office employee must review, modify/adjust the technician's time entries to the RO's. This can be done at the end of the day or the next morning for the previous day. This must be done every day for the following reasons:

- The technicians will be able to remember their work activity in case corrections need to be made.
- The technician's cost will be applied to the RO for proper real-time profit and cost awareness.

To review the Technicians total time for the day, go to "File", "Payroll", Timeclock" and then "Print Timecard". Select the starting and ending date for the day that is being reviewed and then preview and/or print. The printout will include all Technicians with entries for the date range. Review the totals for the day and review the start times, end times for their lunch break and then the last ending time.



Tech: GLENN CHILDRESS
Start Date: 9/29/21
End Date: 9/29/21

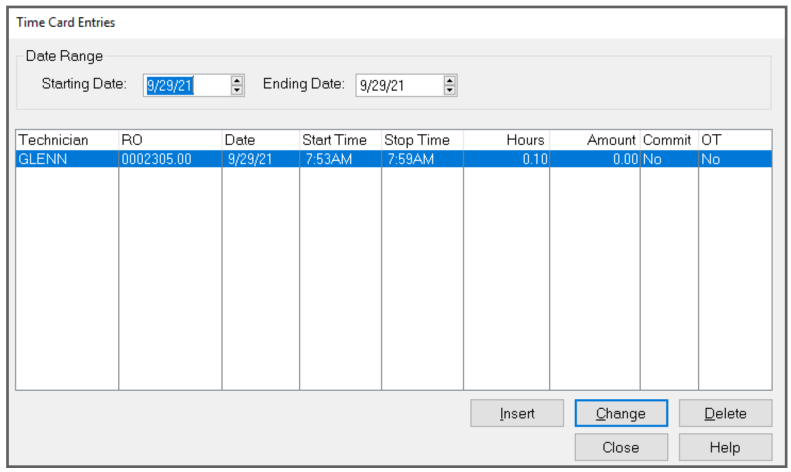
Technician Time Card
Rome Technologies, Inc #1
9/29/21 8:15AM

Page: 1
by Work Date

Work Date	Start Time	End Time	Repair Order	Customer Name	Account	Hours
9/29/21	7:53AM	7:59AM	0002305.00	Shaw	30303	0.10
					9/29/21 **Subtotal:**	**0.10**
					GLENN **Subtotal:**	**0.10**

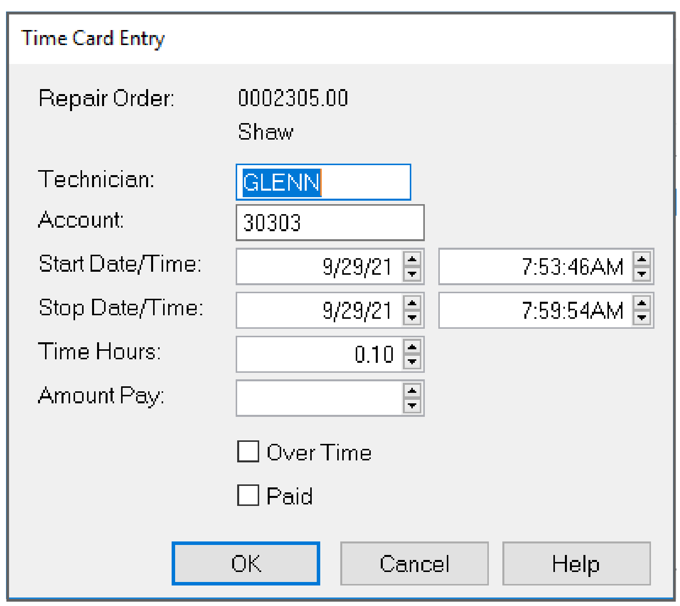
To make any adjustments to the entries, go to “File”, “Payroll”, “Timeclock” and “Manual Time Entry” to review and “change” any entries that require corrections.

NOTE: If the tech does not logout of their last RO for the day, then the system will count their hours to midnight of that day. Highlight any entry and then click “change”. Adjust the start or ending times and the click on “OK”.



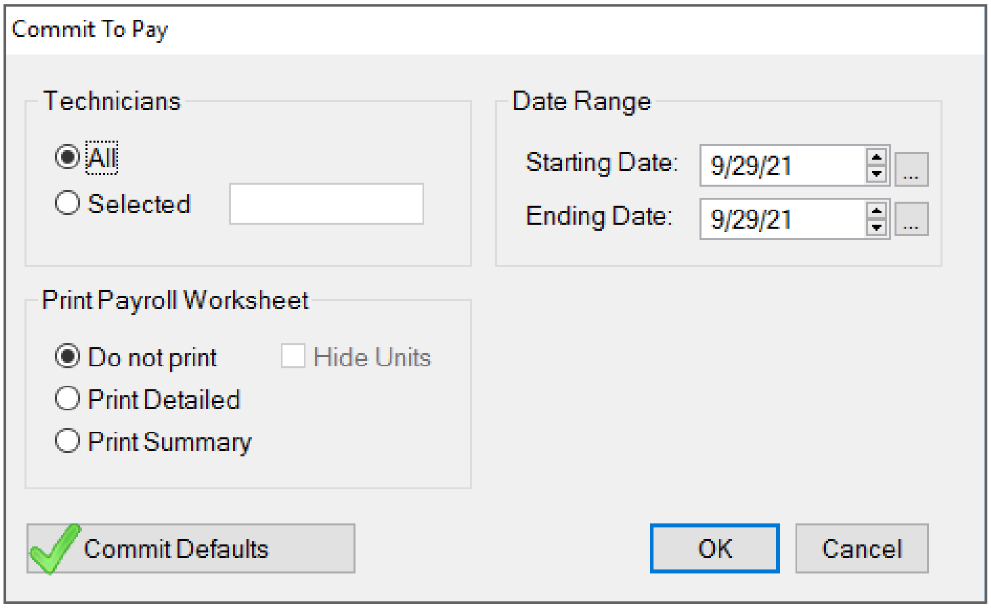
NOTE: When entering any time manually in Rome you can simply type the four numbers of the time and then an “A” or a “P” and then hit the “TAB” button on your keyboard. If you understand military time, then those four numbers can also be used without the perspective of AM or PM.

Reprint the Timecard report to ensure that any adjustments were made correctly.

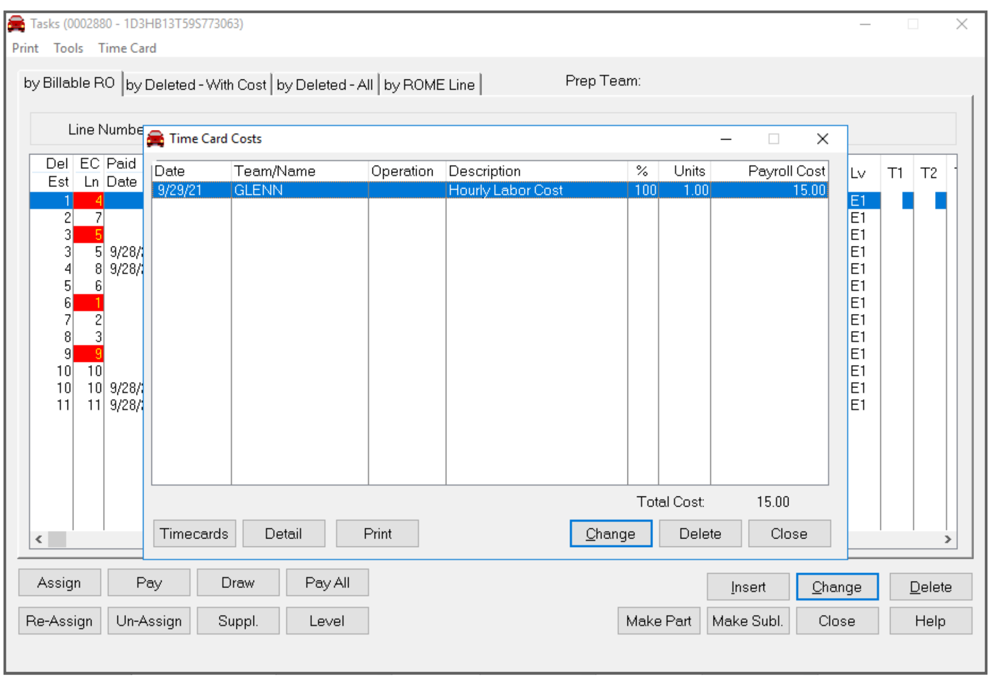


3. COMMIT TIMECARD PAYMENTS – OFFICE STAFF

It is now important to “Commit Payments”. Go to “File”, “Payroll”, Timecard” and then “Commit Payments”. Select the starting and ending date and then click on “Ok”. This process locks the time entries and moves the employee’s timeclock cost to the “Cost Tab” of the RO.



Committed Time Station entries are viewable in the Labor Detail button of the RO by clicking on “Timecard” at the upper left.



ROME

Below are additional key reports listed in the Timecard payroll area:

- **Technician Job Performance** - This report prints a technician's timecard entries on a single RO. **NOTE:** On the "Labor" detail button of an individual RO there is a "Timecard" button at the top left of the window. Clicking this button will display all committed Timecard entries for the RO.

- **True Cost of Labor –** This report analyzes the number of labor hours assigned to a technician compared to the timecard entries. The report can be printed by sales dollars or hours/units of labor.

- **Labor Efficiency –** This report is like the True Cost of Labor report, but the results are expressed as a percentage of efficiency rather than a profit percentage.

- **Timecard/RO Labor Comparison –** This report compares the total labor sales hours/units to the number of timecard hours. This report is designed to identify open RO's where the estimate/supplement hours are below the timecard entries. Any RO's on the report with negative "difference" numbers to the right need to be reviewed and supplements written.

NOTE: It is NOT required that timeclock employees are assigned to labor accounts or manually assigned labor lines in the Labor detail button of the RO to calculate timecard payroll and labor gross profit. If detailed labor efficiency is desired. then the individual technicians and/or teams must be assigned in the labor detail button of the RO.

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If you have any further questions, please contact Rome Technical Support at 1-800-373-7663 or you may login to the Rome Technologies Client Portal to view further Rome Socrates Client documentation, video training or to request 1-on-1 remote training. If you do not have your login and password for your shop to the client portal, then simply call Rome Support to request your credentials. As always, it is our pleasure to serve you.

ROME

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