




# Beyond - Creating Customer Worksites

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## What is a Worksite?

Worksites are the addresses for the physical locations that you are sending employees. They help calculate taxes during payroll, and help you document the location for each job site.

VISIFILE	DETAILS	DEFAULTS	DOCUMENTS	INVOICE HISTORY	INVOICE SETUP	MORE
<b>^ Worksite Details</b> 						
Worksite Name	Minneapolis Location	Active	Yes			
Address	123 Nowhere Lane Minneapolis, MN 55404 United States of America	County	Hennepin			
School District	--	Directions	Park in back lot. Aprons will b...			
Dress Code	Casual - no holes in jeans, no s...	Time Zone	Central Standard Time			
Observes Daylight Savings	Yes	Accessible to Public Transportation	No			
<b>^ Punch Locations</b> 						
No punch locations						
<b>^ Payroll Tax</b> 						
Exempt	No					

## How are Worksites Different From Departments?

Departments help create additional separation for larger customers. They allow for different defaults, statuses, contacts, and more. Worksites exist both on a primary customer record and any departments to allow you to add the locations that employee's may be sent to work.

If you are looking for more information on departments, check out [Beyond - Creating and Managing Departments](#)

**This article walks through:**

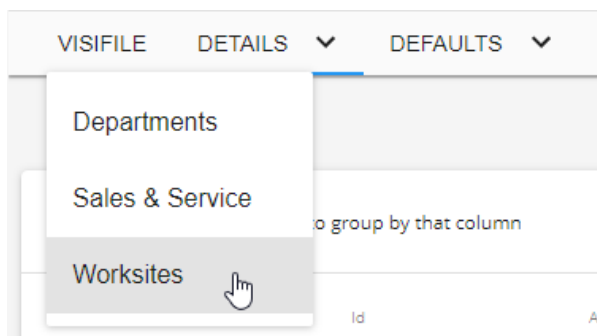
1. [How to Create a Worksite](#)
2. [Selecting the Correct Worksite](#)
3. [Default Worksites](#)

# How to Create a Worksite

Worksites are set up on Customer/Department records in Beyond.

*Looking for a video tutorial? Worksites are included in our video on [customer defaults](#):*

1. Navigate to the Customer or Department record you want to add a worksite to
2. Tap on the arrow next to the Details tab and choose Worksites



3. Select the  button to add a new worksite to the list
4. Enter the Worksite Details -

## Worksite Details - Worksite Details

1 Worksite Details

2 Payroll Taxes

3 Sales Taxes

Worksite Name

Minneapolis Location

Is Active

Address

Street

123 Nowhere Lane

Street 2

City

Minneapolis

State

Minnesota

Zip Code

55404

Country

United States of America

Other Information

Time Zone

Central Standard Time



Dress Code

Casual - no holes in jeans, no sweat pants

Observes Daylight Savings

Accessible to Public Transportation

Directions

Park in back lot. Aprons will be provided on the first day.

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CANCEL [NEXT >](#)

- **Worksite Name:** A unique name used to describe the location, e.g. Downtown, 2nd Street, South Shipping, etc.
- **Address Information:** The physical location of the site
- **Time Zone:** This is relevant especially for clients that are utilizing our [TempWorks TimeClock](#) solution. From the drop-down menu, set the time zone on the worksite to the time zone that the clock is in. The "Observes Daylight Savings" box should be selected in all instances *except* for clocks that are located in places where they do not observe daylight saving time (ex. Arizona and Hawaii).
- **Dress Code & Directions:** Allows users to input dress code and directional information related to the worksite. Text entered here will display/pre-fill into orders that are created for this worksite and will also post out to the WebCenter employee portal.
- Click next to continue

5. Select Payroll Tax Information -

## Worksite Details - Payroll Taxes

Worksite Details  2 Payroll Taxes  3 Sales Taxes

Please select a local tax profile from the menu below:

	City	City Juris	School District	School Juris	County	County Juris
<input checked="" type="checkbox"/>	Minneapolis				Hennepin	

City Tax Exempt       School Tax Exempt       County Tax Exempt

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CANCEL   [< PREVIOUS](#)   [NEXT >](#)

- Beyond utilizes the zip code that was entered within the *worksite details* step of the wizard to determine local tax profiles (state, city, school district, county, etc.). As long as the worksite selected *on the order* is accurate, payroll taxes will be as well.
- For Worksites within the state of Pennsylvania, a PSD Code will need to be selected when creating the Worksite:

Worksite Details - Payroll Taxes

Worksite Details  2 Payroll Taxes  3 Sales Taxes

\* PSD Code

City Tax   Exempt

School Tax   Exempt

Local Service Tax

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- Once the PSD code has been selected, if there is an associated Local Service Tax, it will automatically apply to the "Local Service Tax" field and will not be editable:

Worksite Details - Payroll Taxes

Worksite Details     
  2 Payroll Taxes     
  3 Sales Taxes

\* PSD Code  
010101 ADAMS TAX COLLECTION DISTRICT

City Tax  
XPAE19956 EAST BERLIN 0.5% 1%  Exempt

School Tax  
YPAEA11110 Bermudian Springs Sd 0.5% 0.5%  Exempt

\* Local Service Tax  
EAST BERLIN BORO/BERMUDIAN SPRINGS S D \$52.00

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- o If the selected PSD Code does not have an associated Local Service Tax, you will also need to select a Local Service Tax via the dropdown:

Worksite Details - Payroll Taxes

Worksite Details     
  Address Standardization     
  3 Payroll Taxes     
  4 Sales Taxes

\* PSD Code  
010101 ADAMS TAX COLLECTION DISTRICT

City Tax  
XPAE19956 EAST BERLIN 0.5% 1%  Exempt

School Tax  
YPAEA11110 Bermudian Springs Sd 0.5% 0.5%  Exempt

Local Service Tax

SAVE AS DRAFT      CANCEL < PREVIOUS    NEXT >

- o Once the PSD Code has been selected for the Worksite, the City and School Tax fields will be unable to be edited:

Worksite Details - Payroll Taxes

Worksite Details   
  Address Standardization   
  Payroll Taxes   
  Sales Taxes

\* PSD Code  
010101 ADAMS TAX COLLECTION DISTRICT

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City Tax  
XPAE19956 EAST BERLIN 0.5% 1%  Exempt

School Tax  
YPAEA11110 Bermudian Springs Sd 0.5% 0.5%  Exempt

Local Service Tax

SAVE AS DRAFT      CANCEL    < PREVIOUS    NEXT >

- Select Next to Continue.

#### 6. Select Any Applicable Sales Tax -

- Typically, sales tax is location specific, meaning it should be applied based on where the employee works.

- **\*Note\*** Not all states require sales tax on staffing services. Please consult your tax professional for specific information for your location.

- If you are in a situation where it would be appropriate to add sales tax, from the 'Select A Sales Tax Jurisdiction To Add' drop-down, simply select the matching jurisdiction:

#### Worksite Details - Sales Taxes

Worksite Details   
  Payroll Taxes   
  Sales Taxes

Select A Sales Tax Jurisdiction To Add




Jurisdiction	Description	Goods Tax	Services Tax
MN-Minneapolis	City of Minneapolis - MN	8.025%	8.025%

- If you do not want sales tax to apply to the worksite, select the checkbox at the bottom:

Do Not Set Up Sales Tax for this Worksite

#### 7. Select Submit to Save Your Worksite

Once you have saved your worksite, you will be brought to the details of the worksite:

VISIFILE				DETAILS				DEFAULTS				DOCUMENTS				INVOICE HISTORY				INVOICE SETUP				MORE			
^ Worksite Details 																											
Worksite Name				Minneapolis Location				Active				Yes															
Address				123 Nowhere Lane Minneapolis, MN 55404 United States of America				County				Hennepin															
School District				--				Directions				Park in back lot. Aprons will b...															
Dress Code				Casual - no holes in jeans, no s...				Time Zone				Central Standard Time															
Observes Daylight Savings				Yes				Accessible to Public Transportation				No															
^ Punch Locations 																											
No punch locations																											
^ Payroll Tax 																											
Exempt				No																							


Select Details > Worksites to return to the list.

### \*Configuration Alert\*

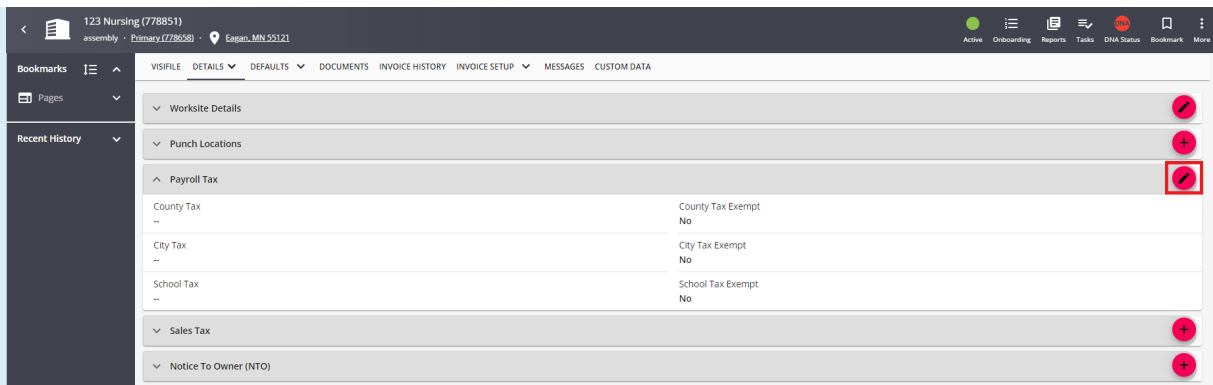
If you are utilizing our Address Standardization configuration for worksites, you may have an additional step to validate the address with the USPS. For more information, check out [Beyond - Address Standardization](#)

## To Edit an Existing Worksite

1. Select it from the list of worksites to see the worksite details.
2. Choose the pencil in the upper right:

VISIFILE				DETAILS				DEFAULTS				DOCUMENTS				INVOICE HISTORY				INVOICE SETUP				MESSAGES				CUSTOM DATA			
Edit 																															
^ Worksite Details																															
Worksite Name				Minneapolis Location				Is Active				Yes																			
Address				123 Nowhere Lane Minneapolis, MN 55404 United States of America				Accrual Location Override				--																			

\*Note\* With the appropriate permissions, you can also edit the "Payroll Tax" card information directly from the Worksite details:



Users will need to be a member of a Security Group with the "Can edit customer worksite payroll tax section" permission, or they will need to be a member of an Advanced Security Group with "access" to the "Payroll Tax" form and related fields:

Can edit customer worksite payroll tax section  
 Allows users to edit the Payroll Tax section by opening a modal component directly in Customer Worksite details

BY PAGE BY FIELD Selecting a parent selects children

🔍 payroll tax ✕

Customer	<input checked="" type="checkbox"/> Access
Worksite <span>Page</span>	<input checked="" type="checkbox"/> Access
Payroll Tax <span>Form</span>	<input checked="" type="checkbox"/> Access
City Tax <span>Field</span>	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
City Tax <span>Field</span>	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
School Tax <span>Field</span>	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
PSD Code <span>Field</span>	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
County Tax Exempt <span>Field</span>	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
School Tax <span>Field</span>	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write

For more information on Security Groups and Advanced Permissions, please see the following articles:

- [Beyond - Managing Security Groups](#)
- [Beyond - Creating Security Groups with Advanced Permissions](#)

If the Worksite is located in PA, the "Payroll Tax" card will **not** be able to be edited, regardless of the aforementioned permissions.

## Selecting the Correct Worksite

Worksites need to be selected when filling out an order record to ensure employees are being taxed properly and that your records are accurate.

1. Navigate to the order Details tab



2. Select the Pencil on the Customer Information Card

Customer Information

Customer	Last Chance General Store - Primary	Alt Job Order Id	--
Burden	--	Worker Comp Code	MN 8810
Worksite	Primary: 3140 NEIL ARMSTRONG BLVD EAGAN, MN 55121-2272 United States of America	Directions	--

3. Select the correct worksite from the drop down

Customer Information

Alt Job Order Id

Burden \* Worker Comp Code  
MN 8810

Worksite  
Primary  
3140 NEIL ARMSTRONG BLVD  
EAGAN, MN 55121-2272

Minneapolis Location  
123 Nowhere Lane  
Minneapolis, MN 55404

Primary  
3140 NEIL ARMSTRONG BLVD  
EAGAN, MN 55121-2272

Warehouse A  
123 MAIN ST.  
ST. PAUL, MN 55121

4. Select Submit to save

## Default Worksites

If you have a list of worksites, you may be wondering how the system chooses which one to be the default worksite when a new order record is created. Good news - you can set what the default worksite is for any customer or department record!

1. Navigate to the customer/department record you want to change the default worksite for

2. Select the Details tab
3. Select the 3 dots icon in the upper right of the Addresses card
4. Select Edit Default Worksite

The screenshot shows the 'DETAILS' tab of a system interface. The 'Addresses' section is expanded, displaying a table with columns for address type and address details. A dropdown menu is open over the 'Default Worksite: Primary' row, showing three options: 'Edit Primary Address', 'Edit Billing Address', and 'Edit Default Worksite'. A mouse cursor is pointing at the 'Edit Default Worksite' option.

Customer Information			
Id	4295014269	Customer Name	Last Chance General Store
Department Name	Primary	Parent	--
Website	--	Branch	Minneapolis
Status	Active >	Activation Date	3/23/2020

Addresses			
Primary Address	3140 NEIL BLVD EAGAN, MN 55121 United States of America	Billing Address	United States of America
Default Worksite: Primary	3140 NEIL ARMSTRONG BLVD EAGAN, MN 55121-2272 United States of America		

5. Select the worksite you want to be the default from the drop down

The screenshot shows a 'Default Worksite' selection dropdown menu. The menu is open, displaying a list of worksites. The 'Primary' worksite is selected and highlighted in grey. The other worksites listed are 'Minneapolis Location' and another 'Primary' worksite.

Default Worksite

\* Select a Worksite

Primary  
3140 NEIL ARMSTRONG BLVD  
EAGAN, MN 55121-2272

Minneapolis Location  
123 Nowhere Lane  
Minneapolis, MN 55404

Primary  
3140 NEIL ARMSTRONG BLVD  
EAGAN, MN 55121-2272

6. Select submit to save your changes

Going forward, any new order records created will save with the new worksite selected by default. You can still change this worksite manually under order > Details.

## Related Articles