




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
^ 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					

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:

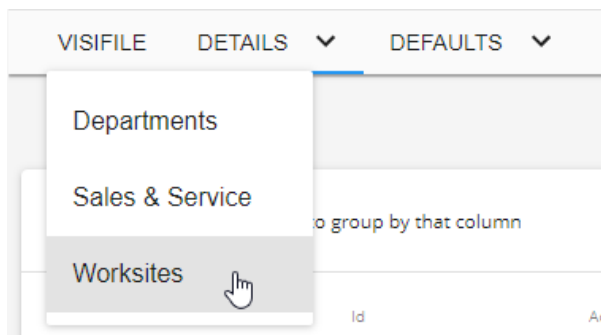
1. [How to Create a Worksite](#)
2. [Selecting the Correct Worksite](#)
3. [Default Worksites](#)

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.

SAVE AS DRAFT

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

1 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

1 Worksite Details ————— 2 Payroll Taxes ————— 3 Sales Taxes

* PSD Code

City Tax Exempt

School Tax Exempt

Local Service Tax

SAVE AS DRAFT CANCEL < PREVIOUS NEXT >

- 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 ▾

SAVE AS DRAFT CANCEL < PREVIOUS NEXT >

- 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 >

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

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				--																			

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 a software interface with a navigation bar at the top containing tabs: VISIFILE, DETAILS (selected), DEFAULTS, DOCUMENTS, INVOICE HISTORY, INVOICE SETUP, MESSAGES, and CUSTOM DATA. Below the navigation bar, there are two main sections: 'Customer Information' and 'Addresses'. The 'Customer Information' section contains fields for Id (4295014269), Customer Name (Last Chance General Store), Department Name (Primary), Parent (--), Website (--), Branch (Minneapolis), Status (Active), and Activation Date (3/23/2020). The 'Addresses' section contains fields for Primary Address (3140 NEIL BLVD, EAGAN, MN 55121, United States of America), Billing Address (United), and Default Worksite: Primary (3140 NEIL ARMSTRONG BLVD, EAGAN, MN 55121-2272, United States of America). A red three-dot menu icon is visible in the top right of the 'Addresses' section, and a dropdown menu is open over it, showing options: Edit Primary Address, Edit Billing Address, and Edit Default Worksite (which is highlighted by a mouse cursor).

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

The screenshot shows a 'Default Worksite' dropdown menu. The menu title is 'Default Worksite'. Below the title, there is a blue link '* Select a Worksite'. The menu contains a list of worksites: 'Primary' (3140 NEIL ARMSTRONG BLVD, EAGAN, MN 55121-2272), 'Minneapolis Location' (123 Nowhere Lane, Minneapolis, MN 55404), and 'Primary' (3140 NEIL ARMSTRONG BLVD, EAGAN, MN 55121-2272). The 'Primary' worksite at the bottom is highlighted with a blue border, indicating it is the selected option.

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