

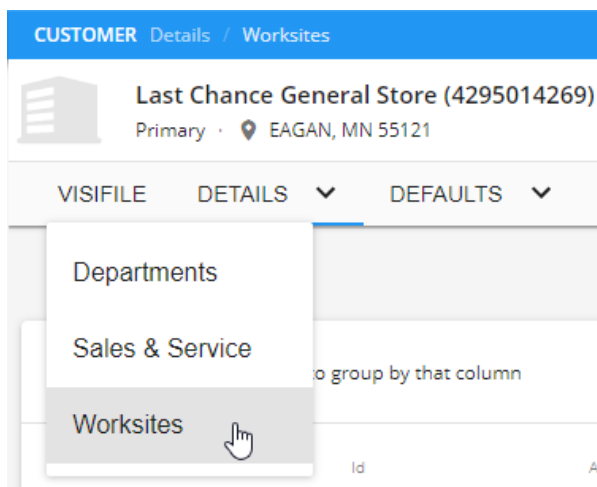
Beyond - Creating Customer Worksites

Last Modified on 11/04/2021 2:24 pm CDT

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.

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

SAVE AS DRAFT

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:

The screenshot shows the 'Worksite Details - Payroll Taxes' form. At the top, there are three steps: '1 Worksite Details' (checked), '2 Payroll Taxes' (active), and '3 Sales Taxes'. Below the steps, there is a dropdown menu labeled '* PSD Code' which is highlighted with a red rectangular box. Underneath the dropdown, there are three sections: 'City Tax', 'School Tax', and 'Local Service Tax'. Each section has a dropdown menu and an 'Exempt' checkbox. At the bottom of the form, there are buttons for 'SAVE AS DRAFT', 'CANCEL', '< PREVIOUS', and 'NEXT >'.

- 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
 Payroll Taxes
 Sales Taxes

* PSD Code
030201 ARMSTRONG TAX COLLECTION DISTRICT

City Tax
XPAA165390 APPLEWOLD 0.5% 1% Exempt

School Tax
YPAAP13085 Armstrong Sd 0.5% 0.5% Exempt

Local Service Tax

SAVE AS DRAFT CANCEL < PREVIOUS NEXT >

- Click 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:


CUSTOMER Details / Worksites / Minneapolis Location

Last Chance General Store (4295014269)
 Primary · EAGAN, MN 55121


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

CUSTOMER Last Chance General Store - Primary (4295014269) / Details / Worksites

Last Chance General Store (4295014269)
Primary · EAGAN, MN 55121

VISIFILE DETAILS ▾ DEFAULTS ▾ DOCUMENTS INVOICE HISTORY INVOICE SETUP ▾ MESSAGES

Drag a column header here to group by that column


Name	Id	Active	Street 1	Street 2
Minneapolis Location	14370	✓	123 Nowhere Lane	
Primary	14201	✓	3140 NEIL ARMSTRON...	
Warehouse A	14202	✓	123 MAIN ST.	

2. Choose the pencil in the upper right

CUSTOMER Last Chance General Store - Primary (4295014269) / Details / Worksites / Minneapolis Location

Last Chance General Store (4295014269)
Primary · EAGAN, MN 55121

VISIFILE DETAILS ▾ DEFAULTS ▾ DOCUMENTS INVOICE HISTORY INVOICE SETUP ▾ MESSAGES CUSTOM DATA

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

JOB ORDER Last Chance General Store, Customer Service Represe... (4295092589) / Details

Last Chance General Store - Primary (4295092589)
Customer Service Representative: 1 of 3 positions filled

VISIFILE DETAILS CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA

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

CUSTOMER Last Chance General Store - Primary (4295014269) / Details

Last Chance General Store (4295014269)
Primary · EAGAN, MN 55121

VISIFILE **DETAILS** ▾ DEFAULTS ▾ DOCUMENTS INVOICE HISTORY INVOICE SETUP ▾ MESSAGES CUSTOM DATA

^ **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
Default Worksite: Primary	3140 NEIL ARMSTRONG BLVD EAGAN, MN 55121-2272 United States of America		

Dropdown menu options:
 Edit Primary Address
 Edit Billing Address
 Edit Default Worksite

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

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