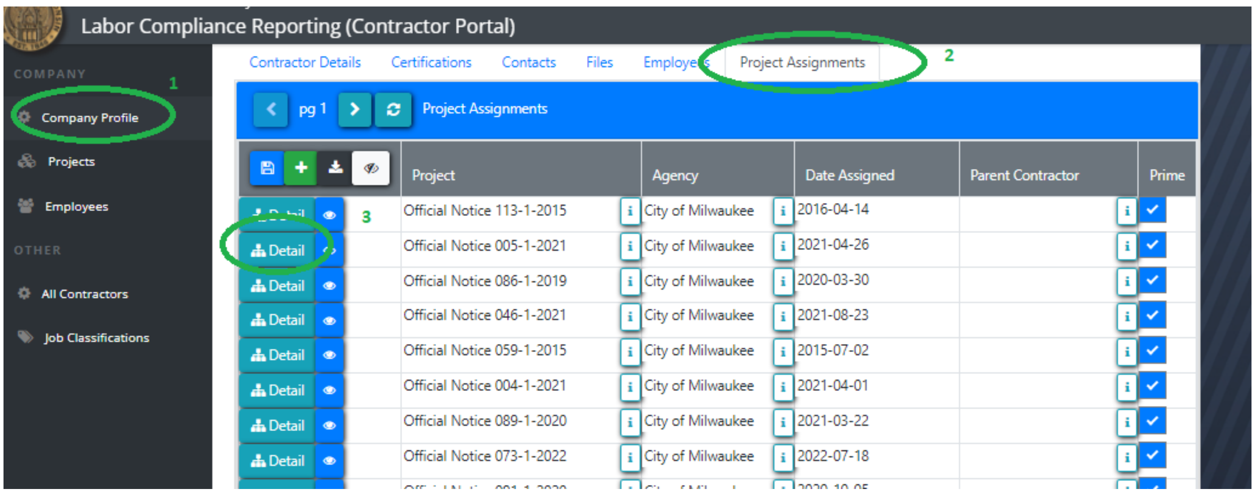
Step 1: Navigate to the Project Assignment record. There are two ways to do that:

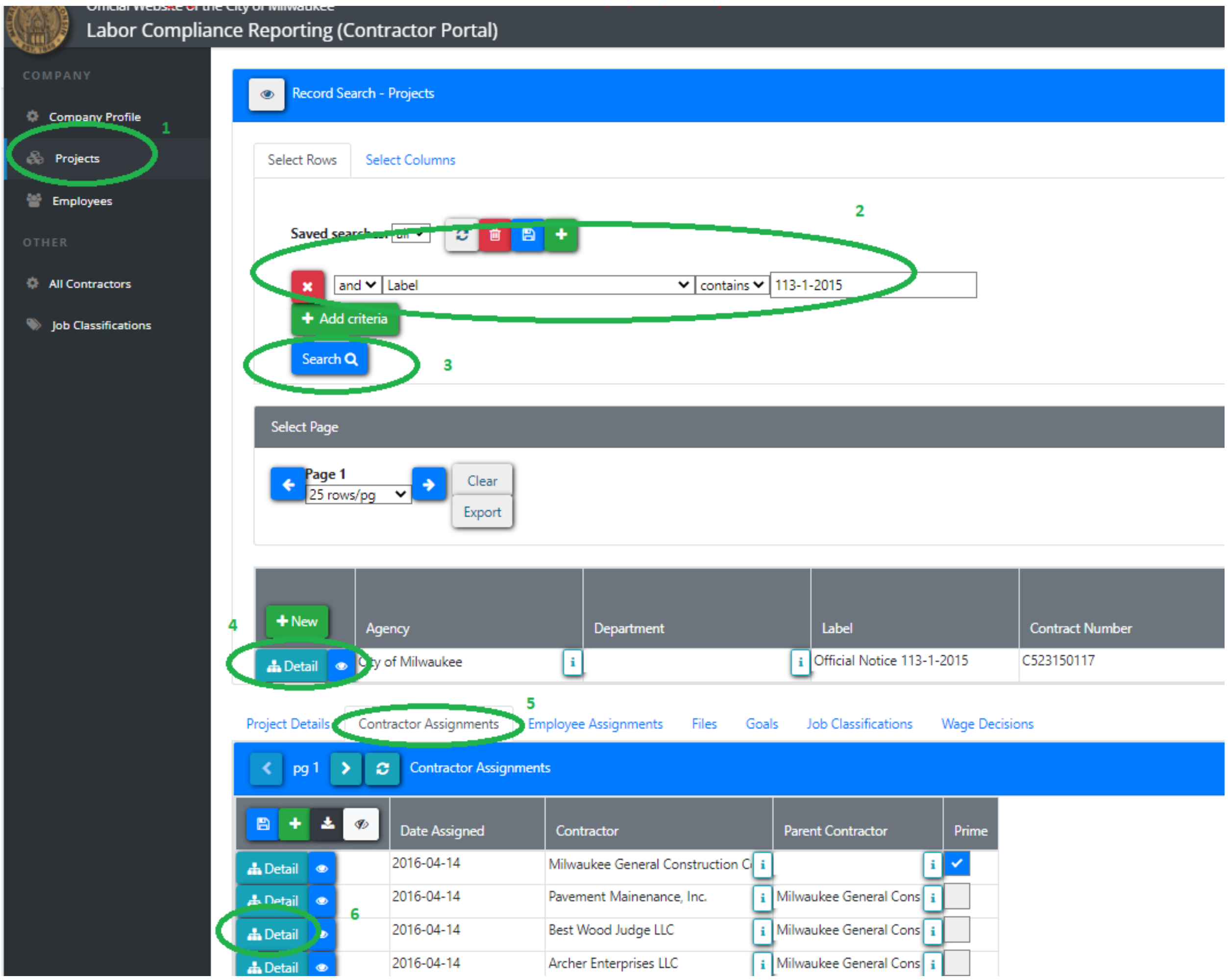
1.alternative 1.

From the sidebar, select “Company Profile”, then go to the “Project Assignments” tab, find the Record, and hit the “Detail” button.

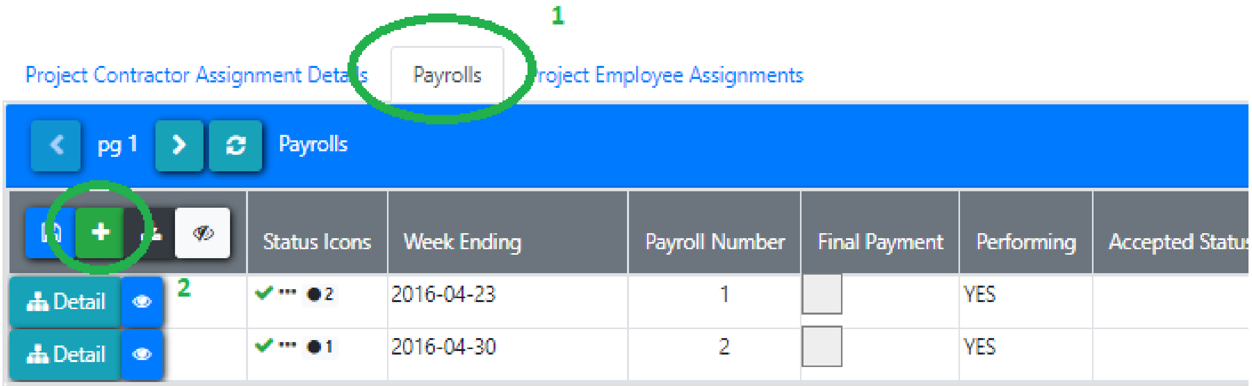


1.alternative 2

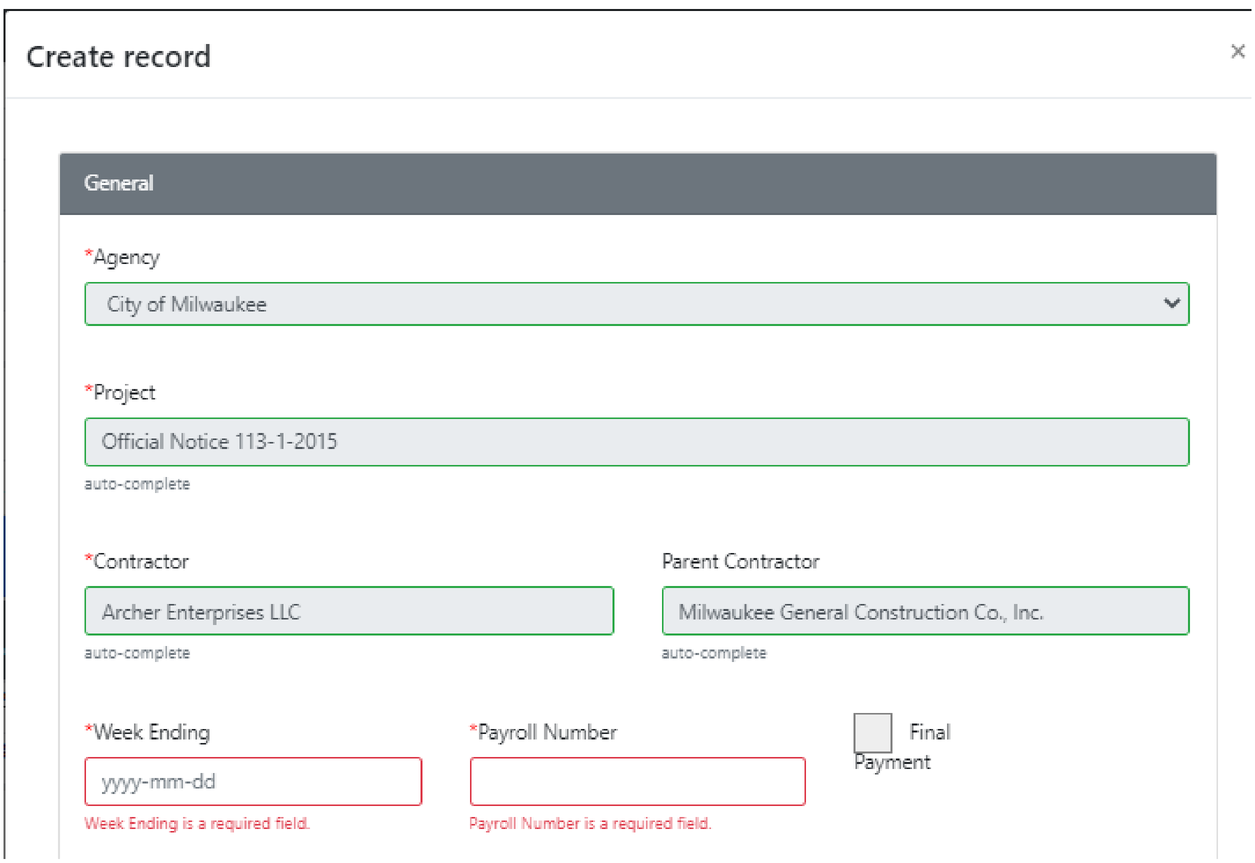
From the sidebar, select “Projects”, enter in some search criteria and hit search, find the desired project and hit “Detail”, then go to the “Contractor Assignments” tab, find the desired assignment and hit “Detail”.



Step 2: Go to the "Payrolls" tab and hit the green "+" button in the table header.



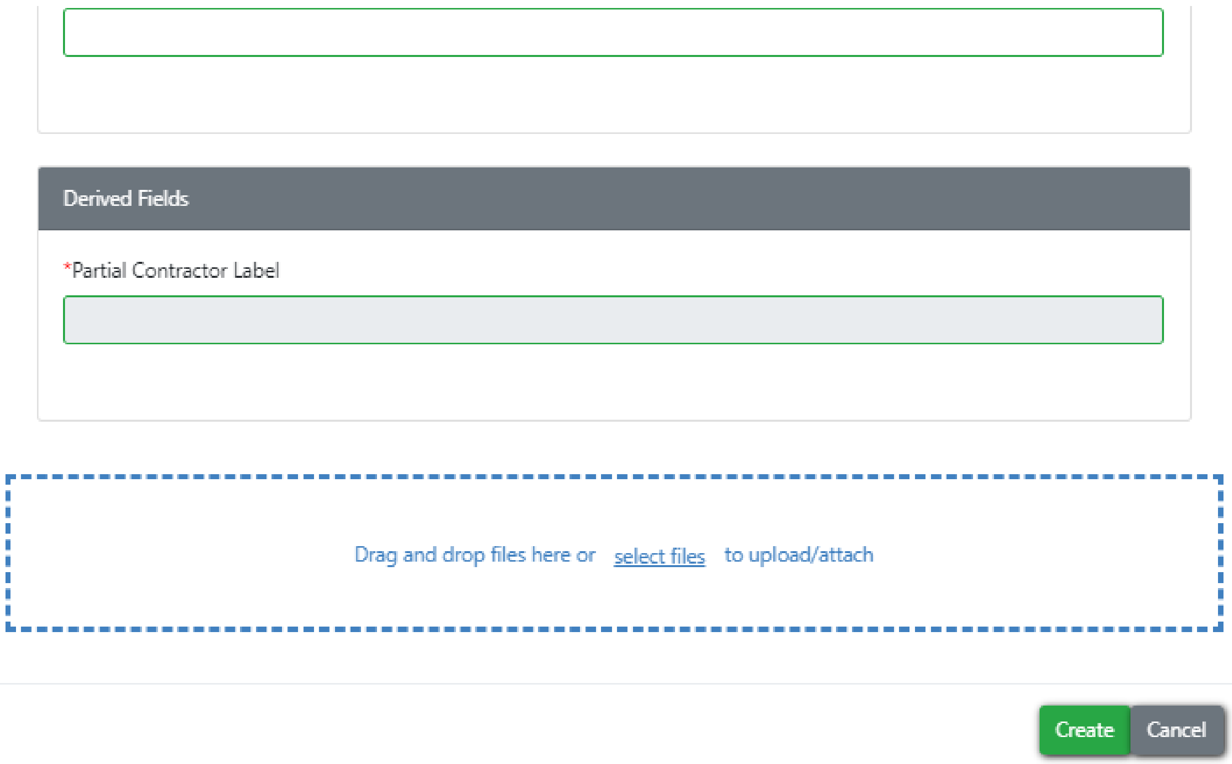
A form will popup. Select the week ending (it must be a Saturday), and enter a "Payroll number" (This can be anything – it is just for easy reference.)



Scroll to the bottom of the form.

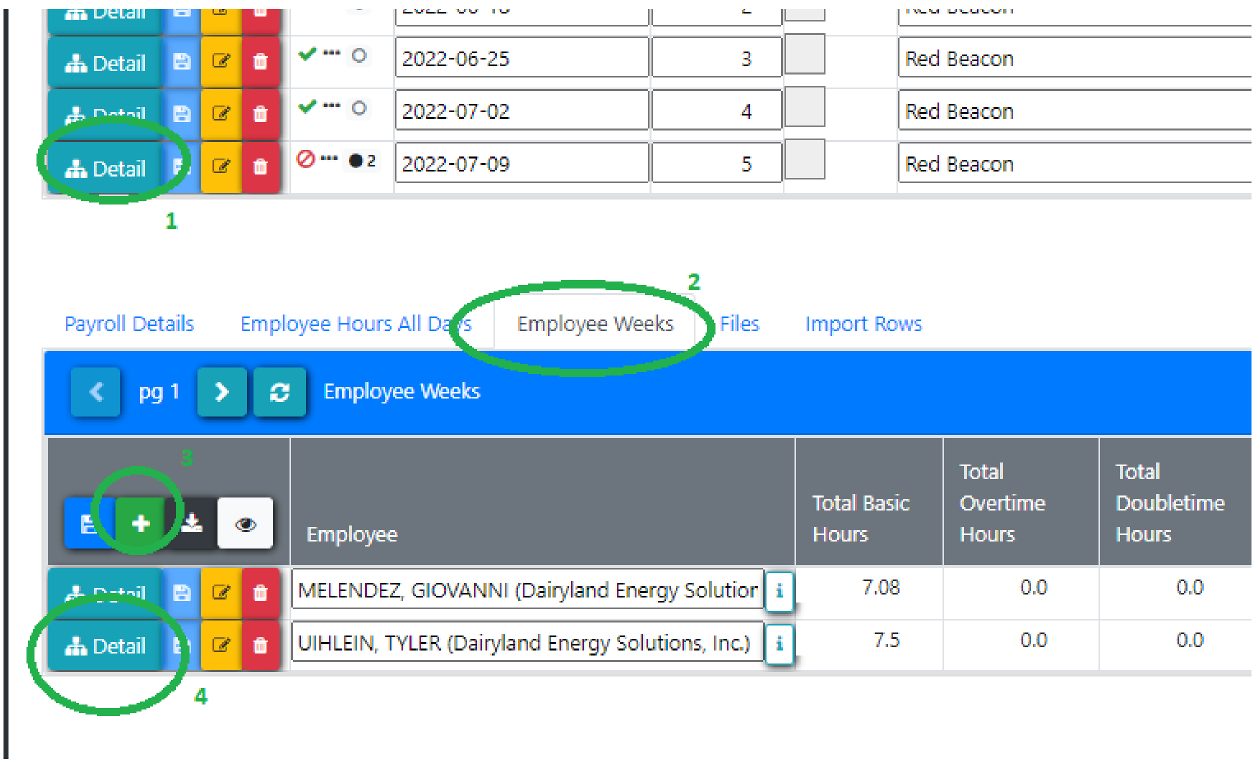
If you have an export from Payroll4Construction, that's in the right format, you can attach it here by dragging and dropping or hitting "select files".

When done, hit the "Create" button.

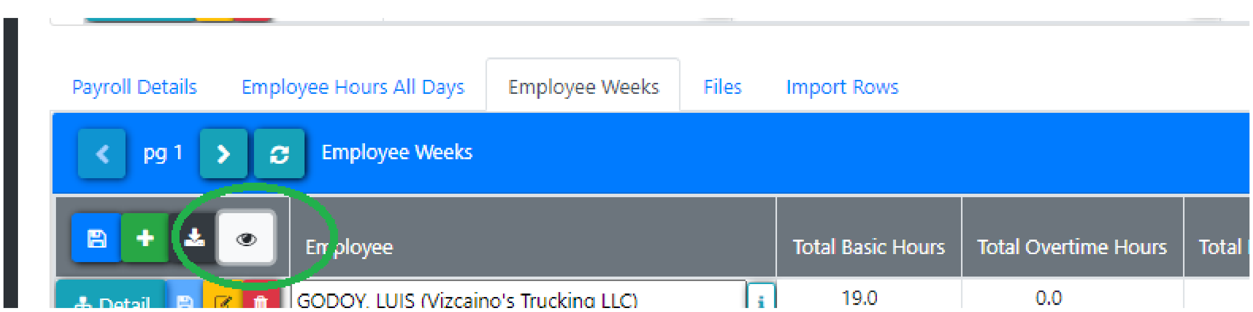


Step 3: Review and/or edit payroll lines

Click on the “Detail” button for the new payroll record (it will have a light green background). From here, you can go to the ”Employee Weeks” tab, to bring up the individual lines for the payroll. To add a new employee to the week, hit the green “+” button and fill out the data, and hit “Create”. Then you can click on the “Detail” button to view and/or edit the details.

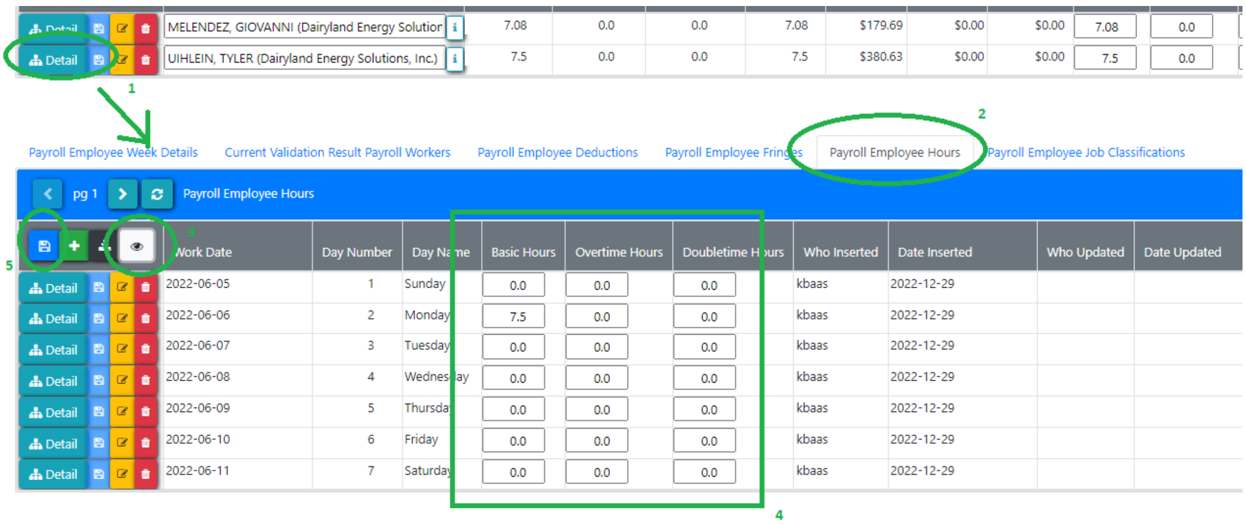


Note: Click on the white eye icon to see the “placeholder rows”. This reveals a blank row for every employee the contractor has assigned to the project.



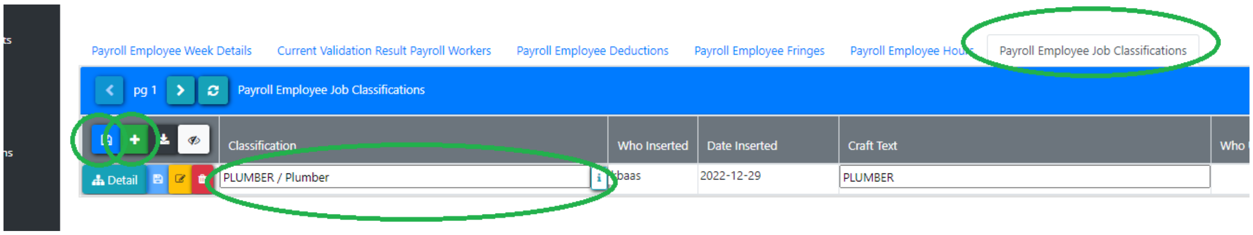
Step 4: Enter/view individual days

From here, you can go to the “Payroll Employee Hours” tab, and hit the white eye icon to reveal “Placeholder rows”. Then fill out the hours for each day, and hit the blue save button in the upper-left of the table to save all your changes.



Step 5: Enter/view assigned employee classifications.

To view/edit job classifications, click on the "Payroll Employee Job Classifications" tab, then press the green "+" button to add a new classification, or edit the classification. (The only field that matters is the first field.) Hit the blue save icon when done.



Final step: Mark payroll record complete

To approve / finalize the payroll. (Mark it complete.)

1. Click on the payroll detail button.
2. Under the first tab, “Payroll Details”, scroll down to the “Status” card, and change “Prime Approval Status” to “Approved.

If the project is set up for validations, it will check them and give you a message if any fail.