Paylocity Integration

Setup Guide

Document Details

Document #: 160_PYSG_260821

System Requirements

- CES Version 11.00.00.xx or higher
- Paylocity
- Crunchtime Cloud-hosted customers (not currently available for cruise or self-hosted customers)

Download the latest version of this document here:
https://links.crunchtime.com/SG-PaylocityIntegrationSetup

… or scan the QR code to the left.

Related User Group Permissions

Screen Name	Control Name	Description
Company	Add/Delete/Save	Enables this screen on the Corporate menu. Add, delete, or make and save changes to Company details.
Company	Update Secret User Defined Attributes	Edit entries for “Secret” Company User Defined Attributes.
Location Details	Add/Delete/Save	Enables this screen on the Corporate menu. Add, delete, or make and save changes to Location details.
Location Details	Update Secret User Defined Attributes	Edit entries for “Secret” Location User Defined Attributes.
Event Scheduling	Add/Delete/Save	Enables this screen on the Interfaces menu. Allows users to add, delete, or update a scheduled event.
Positions	Add/Delete/Save	Enables this screen on the Labor menu. Allows users to add, delete, or save changes to positions.

Related Documentation

- Position Code Mapping Worksheet: https://links.crunchtime.com/PositionCodeMappings

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Introduction

Overview

Crunchtime has developed API Integration between the Crunchtime platform and Paylocity. This integration will push Employee data (new hires & changes) from Paylocity to Crunchtime.

Crunchtime supports a one-to-many relationship with Paylocity. This means we can connect a single instance of Crunchtime to multiple instances of Paylocity. Additional details on supporting this configuration option are outlined on Page 8.

Be Aware: Paylocity charges customers a fee for utilizing this API integration.

Process

This guide will cover the following steps needed to set up the Paylocity integration:

1. Configure the User Defined Attributes in Crunchtime
2. (Optional) Configure Alternate Company IDs
3. Contact Crunchtime Support to request a Refresh Token & Test Connectivity
4. Verify Master Data Setup:
   - Match Positions between Crunchtime and Paylocity
5. Define Cost Centers in Paylocity
6. Schedule the Employee Sync
7. View the Confirmation Email to verify whether the files were received successfully

Requirements

- One of the Paylocity cost centers (Cost Center 1, Cost Center 2 or Cost Center 3) must contain the location data that is needed to map Paylocity cost center information to Crunchtime locations.
- If Employee Numbers in Paylocity are globally unique, the Crunchtime Employee number must match the Paylocity Employee Number.
- If Employee Numbers in Paylocity are not globally unique, the Crunchtime Employee number must be formatted as [First Initial + Last Name + Paylocity Employee Number].
  - *Example: First Name = John, Last Name = Reese, Paylocity Employee Number = 092211 Crunchtime Employee Number = JReese092211*
- If employee numbers in Paylocity are not globally unique, Social Security Numbers (SSN) MUST be passed from Paylocity to Crunchtime as this is the only globally unique employee identifier.

  In this case, the following User Group permissions should be disabled for all User Groups to ensure that the SSNs are not visible in Net-Chef:
  - NC-Emp. Maint. > Social Security Number - View
  - NC-Emp. Maint. > Social Security Number - View and Edit

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Paylocity Integration

Introduction (Continued)

Related Employee Data

The following fields may be updated by this integration.

Paylocity Field	Crunchtime Field	Required
employeeId	Payroll ID Number	Y
employeeStatus	Status	Y
hireDate	Date Hired	Y
dateOfBirth	Date of Birth	Y
firstName	First Name	Y
lastName	Last Name	Y
personalEmail	Email Address	N
positionCode	Position Code	N
payType	Pay Type	Y
annualSalary	Salary	Y
Supervisor	Manager flag	N
costCenter	Location Code	Y
currentPayRate.baseRate	(Pay) Rate	N
gender	Sex	N
homePhone	Phone Number	N
address.city	City	N
SSN	Social Security Number * #	N

** See the "Requirements" section on the previous page.*

 # This depends on the "PY_EMP_SOC" UDA setting; see Page 7 for more information.

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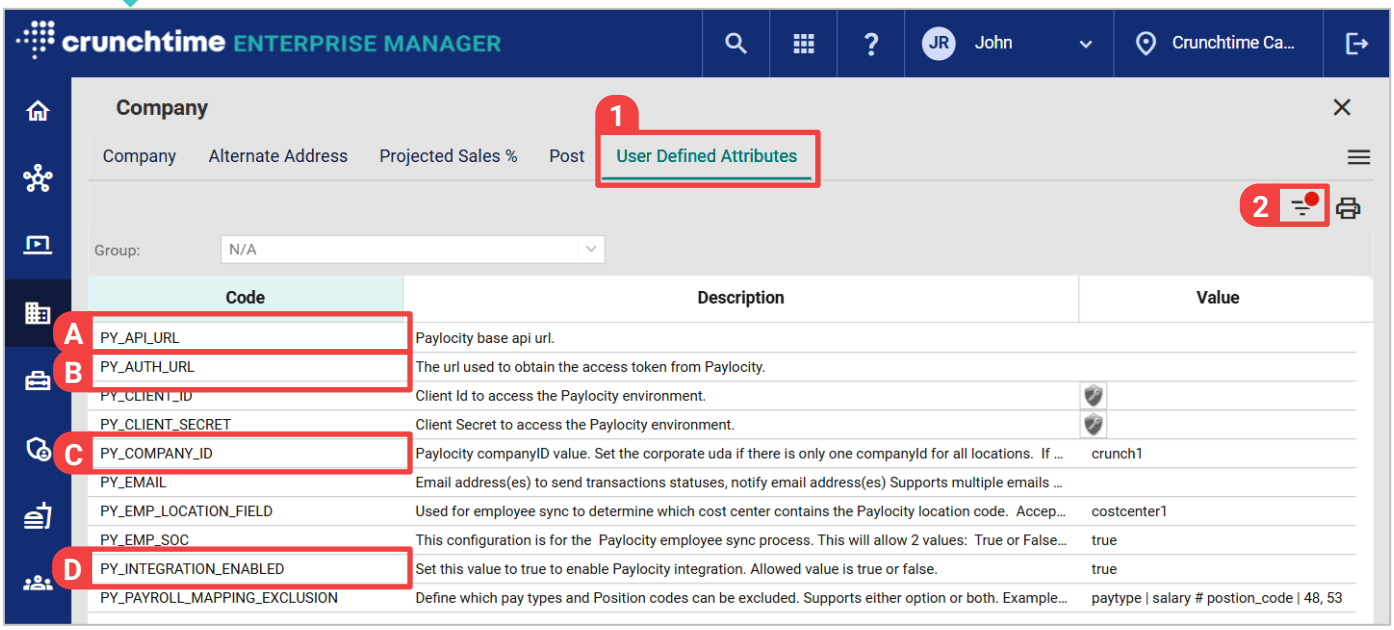
Configure User Defined Attributes

Overview

A User Defined Attribute (UDA) is a manually entered value used to configure attributes that don't exist natively within the Crunchtime application but may need to be referenced for your integration with Paylocity. These settings are first configured at the Company level and then some may be further configured at the Location level if necessary.

Company UDAs

Enterprise Manager > Corporate: Company > User Defined Attributes



1. Choose the *User Defined Attributes* tab.
2. Use the *Filters* to locate UDAs with "Code" = 'PY'. This will display only attributes related to the Paylocity integration.
3. The values for following UDAs (outlined above) are crucial for the integration between Crunchtime and Paylocity to function.
   - A. PY_API_URL – Enter the following URL: https://dc1prodgwext.paylocity.com
   - B. PY_AUTH_URL – Enter the following URL: https://dc1prodgwext.paylocity.com/public/security/v1/token
   - C. PY_COMPANY_ID – Follow the steps on the next page to obtain your Company ID from Paylocity and enter it here.
   - D. PY_INTEGRATION_ENABLED – Set this value to 'true' to enable Paylocity integration.

Note: The PY_CLIENT_ID and PY_CLIENT_SECRET attributes are pre-populated by Crunchtime.

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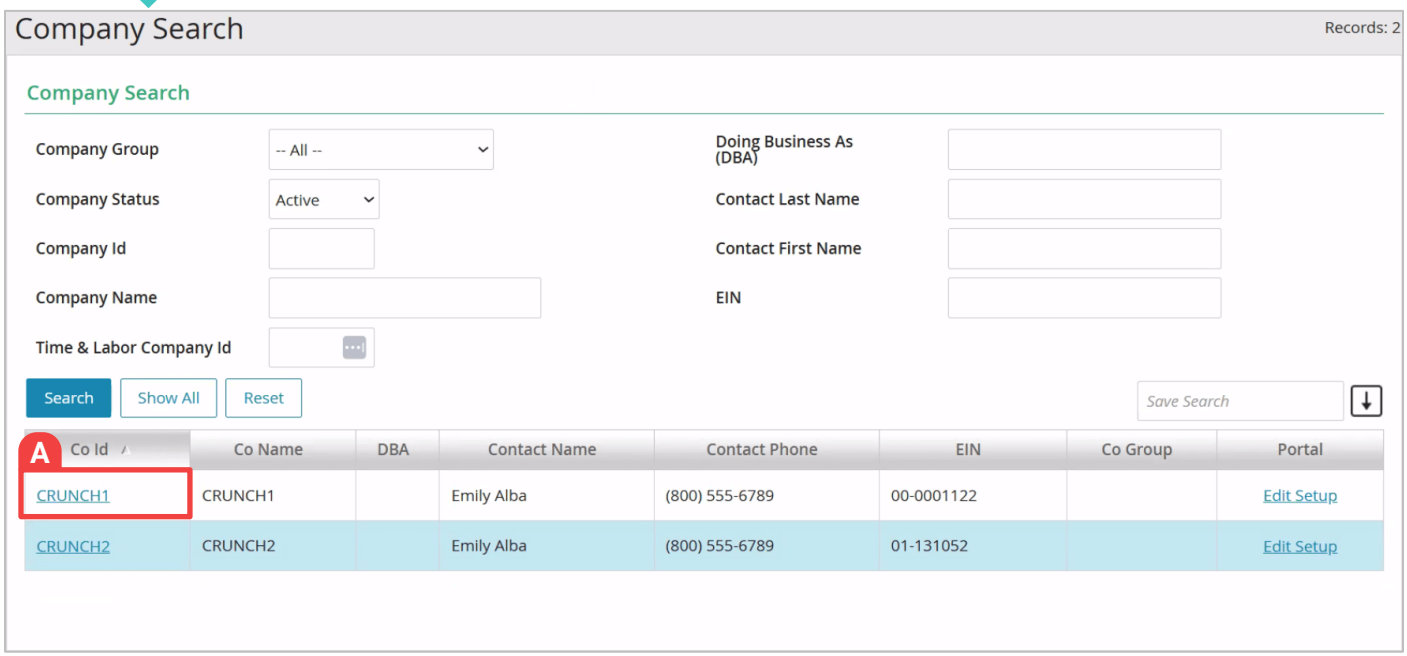
Paylocity Integration

Configure User Defined Attributes (Continued)

Obtain the Paylocity Company ID

Paylocity > Company Set > Company Search



A From the Paylocity main screen, copy the *Company ID* value and paste it as the **PY_COMPANY_ID** under the Company User Defined Attributes in Enterprise Manager.

Note: If your integration between Paylocity and Crunchtime is a one-to-many relationship, see Page 8 for information regarding Alternate Company IDs.

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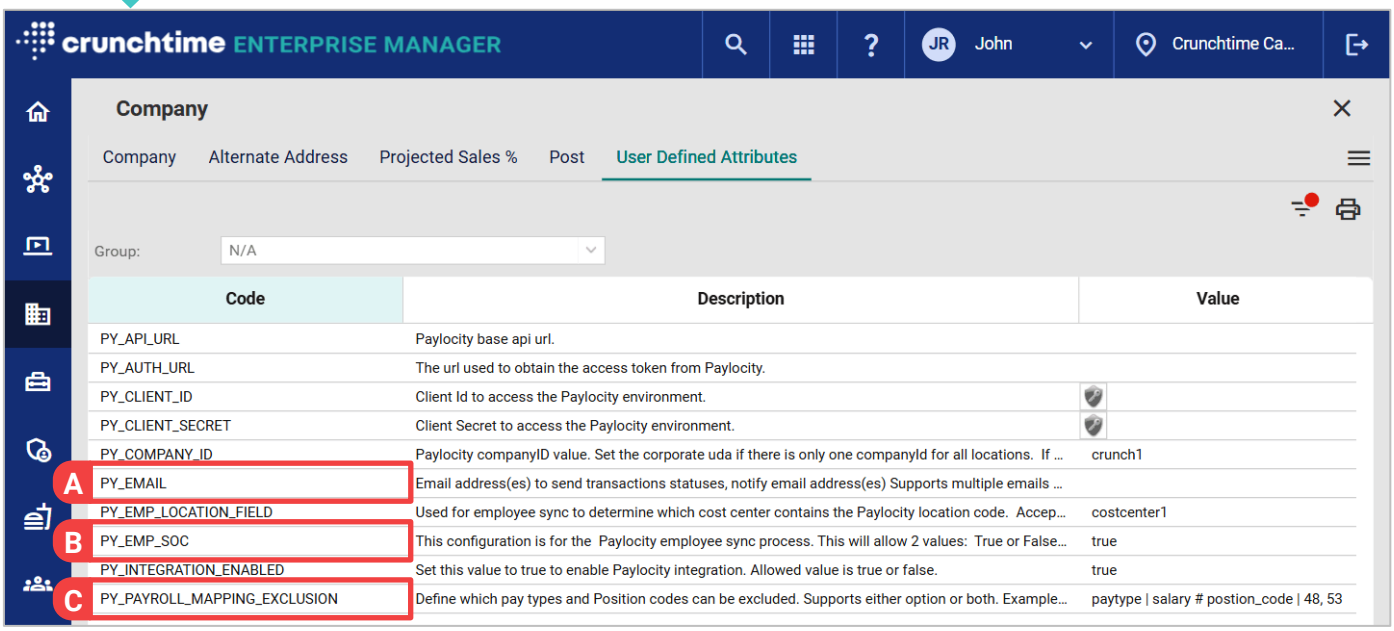
Paylocity Integration

Configure User Defined Attributes (Continued)

Configure Additional Attributes

Enterprise Manager > Corporate: Company > User Defined Attributes



A PY_EMAIL – Email address(es) to send transaction status notices; supports multiple emails separated by a comma. *This is highly recommended as it is the only mechanism to receive status notices related to successes and failures of the integration*.

B PY_EMP_SOC – Used to determine whether the employee's SSN will be included in the data sent from Paylocity to Crunchtime. If populated, must be 'true' or 'false'. If 'true', the employee's SSN will be included; if 'false' or left blank, the SSN will not be included. Based on the Requirements listed on Page 3, if Employee Numbers are globally unique this should be set to 'false'; if not, this should be set to 'true'.

C PY_PAYROLL_MAPPING_EXCLUSION – Used to define which Pay Types and/or Position Codes should be excluded from the data sent from Paylocity to Crunchtime. Separate parameters and values with a pipe character; separate multiple values with a comma; separate multiple parameter & value pairs with a hashtag, Example: PAY_TYPE | Salary # POSITION_CODE | 48, 53. This means that Employees with a Pay Type = 'Salary' and/or those linked only to Positions 48 or 53 will not be included in the sync.

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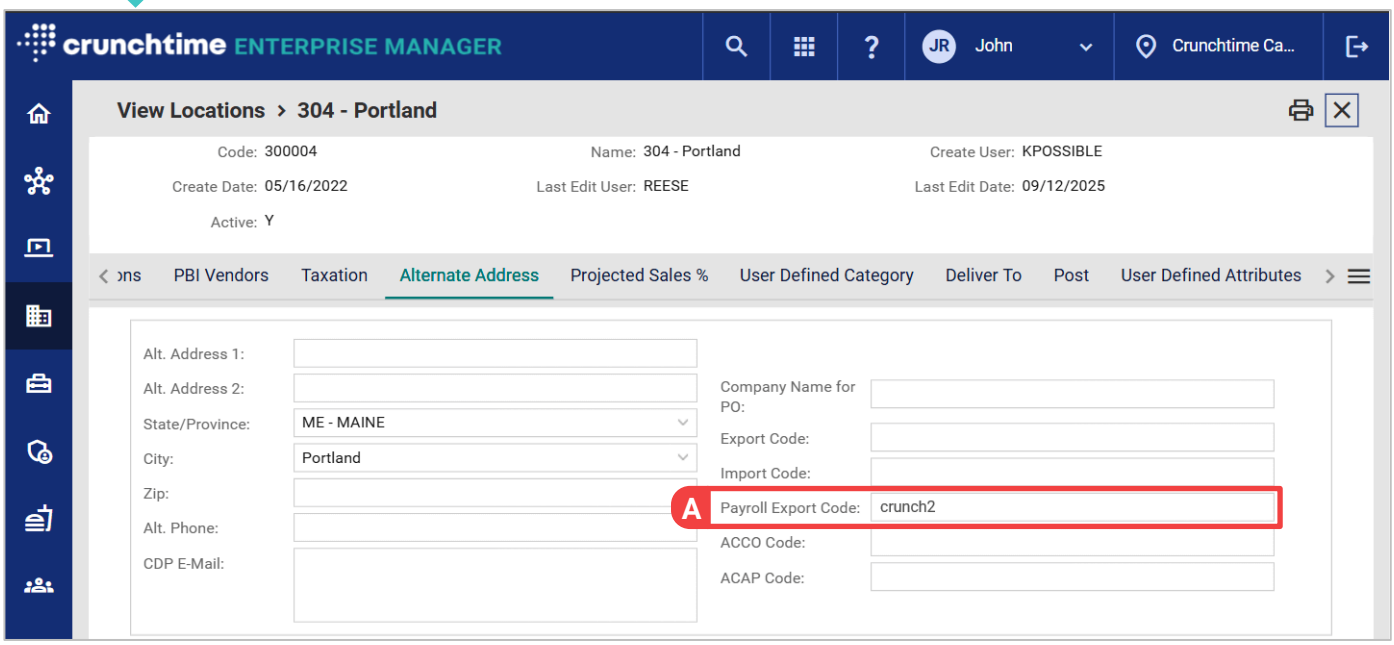
Configure Alternate Company IDs

Stop: If your integration between Crunchtime and Paylocity is 1:1, all of your locations are associated with the same Company ID, which means you can skip this page. Otherwise, proceed as indicated. (*To verify this, check Paylocity to see the number of Company IDs defined; see example on Page 6.*)

Location Alternate Address Information

If you own multiple Companies, each one will have its own Company ID; most of these will not be the same as the one listed as the PY_COMPANY_ID on the User Defined Attributes tab in the Company screen (shown on Page 4). Each location associated with one of the alternate Company IDs will need this ID entered as its Payroll Export Code.

Enterprise Manager > Corporate: Locations > {Edit} > Alternate Address



A Enter the alternate Company ID associated with this location.

Example: (From page 6) The 'crunch1' Company ID is for the primary (parent) company; the 'crunch2' Company ID refers to a secondary entity (a subsidiary or division). Locations associated with the 'crunch1' ID can leave this blank. All locations associated with the 'crunch2' Company ID must have that entered that here. The same is true for any other Company IDs.

Note: The Payroll Export Code can be imported via the Location API or the 252 Locations CDP file. For these resources, go to the Crunchtime Developer Hub: https://developer.crunchtime.com or see the Standard Interface Guide: https://links.crunchtime.com/RG-StandardInterfaceReference.

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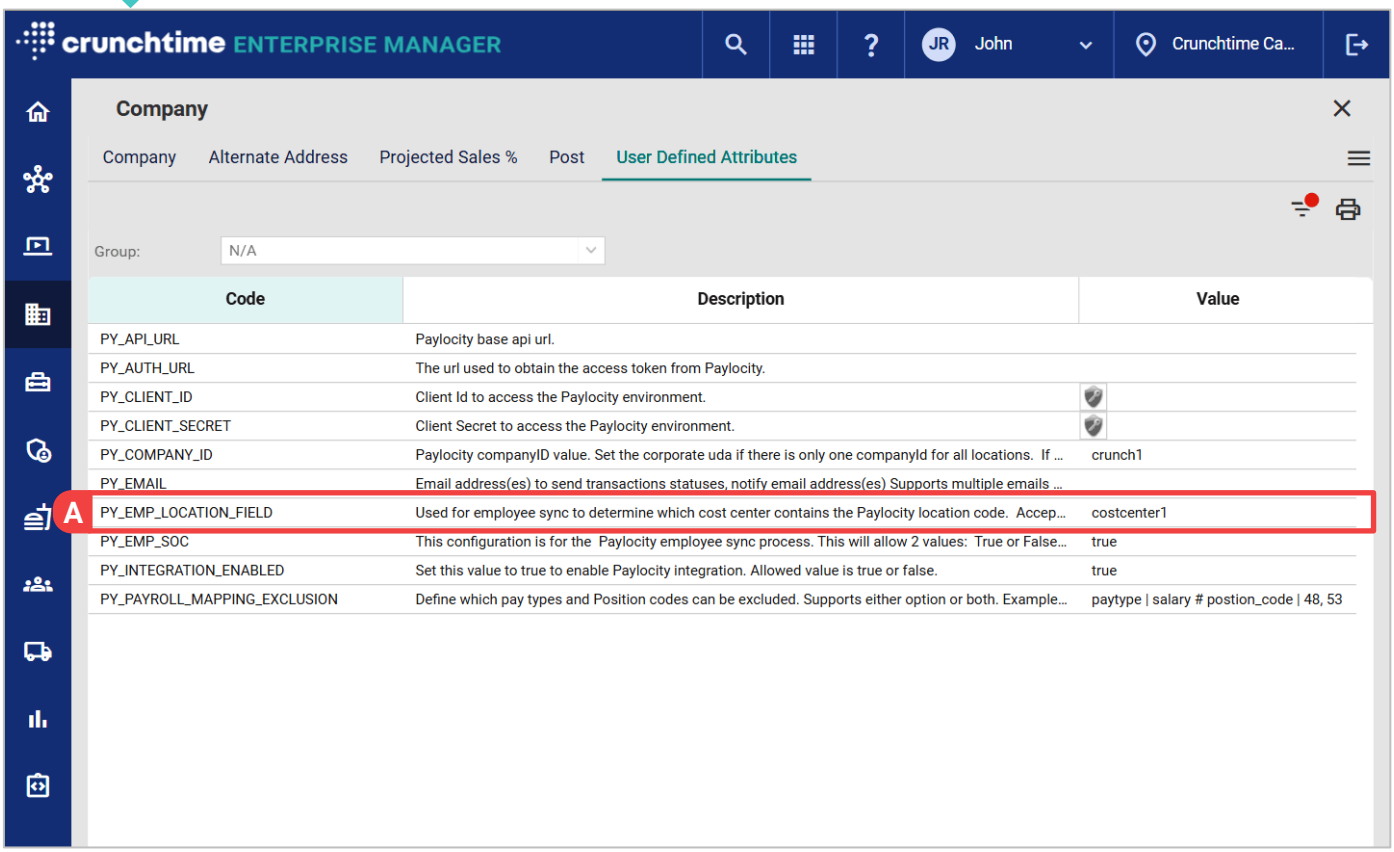
Cost Centers in Paylocity

Cost Centers are used to assign employees to the proper location in Crunchtime. There are two UDAs in Enterprise Manager (one at company level and one at location level) that need to be configured.

Company UDA

Enterprise Manager > Corporate: Company > User Defined Attributes



A PY_EMP_LOCATION_FIELD – Used to determine which cost center contains the Paylocity location code. Must be ‘costcenter1’, ‘costcenter2’, or ‘costcenter3’. Each of these Cost Centers is associated with a specific set of locations.

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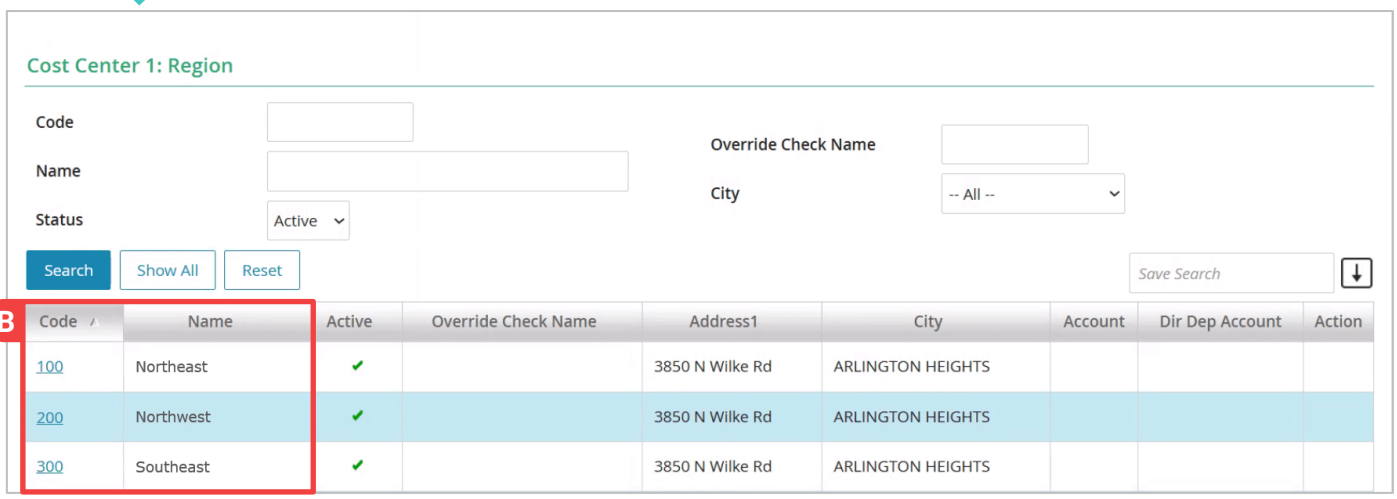
SETUP GUIDE

Paylocity Integration

Using Cost Centers in Paylocity (Continued)

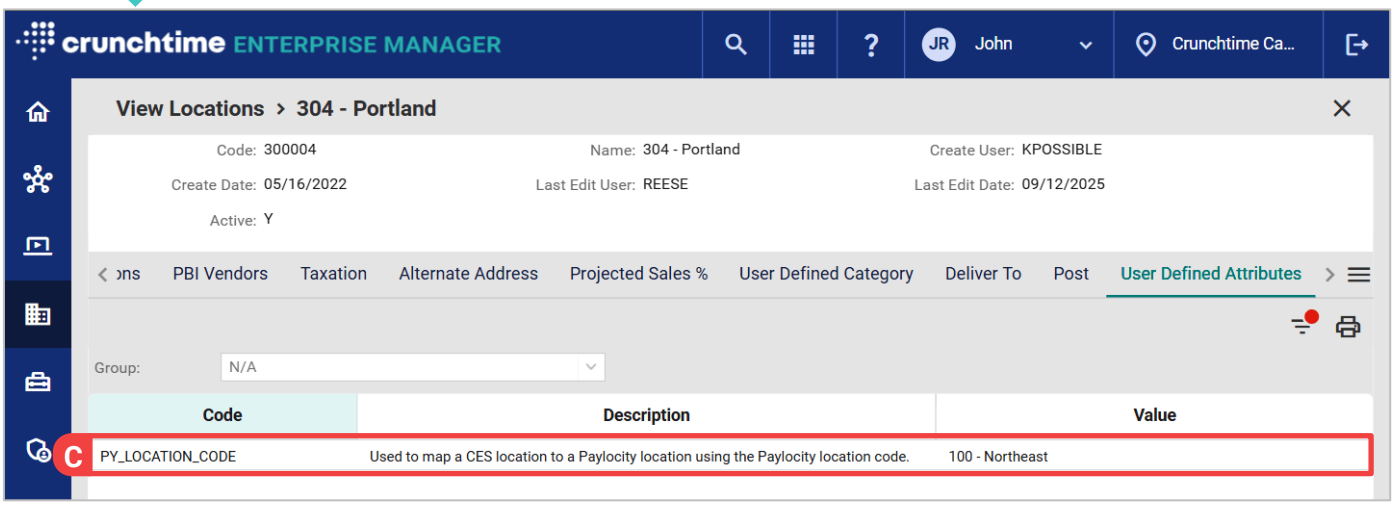
Paylocity > Configuration > Company Setup > Cost Centers



B Here you can see the *Code* and *Name* for the Cost Center regions in Paylocity.

Location UDAs

Enterprise Manager > Corporate: Locations > {Edit} > User Defined Attributes



C PY_LOCATION_CODE – Enter the Paylocity code associated with the location. This matches the location to the appropriate Cost Center in Paylocity. As shown above, the format for this entry is 'Code' – 'Name'.

Important: If you're not ready to sync the employee data for a particular location, do not configure the cost center for that location just yet.

Note: The Data setup now is complete. The setup on Page 13 will enable the integration to run.

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Contact Crunchtime Support

Overview

Once you have configured the User Defined Attributes noted on the previous pages, you need to contact Crunchtime Support to request a test of the connectivity between the two systems. If you are a Franchisee, please be sure to have your Corporate approved support contact reach out to Crunchtime Support on your behalf, with you CC'd.

Sample Support Ticket Text

"Greetings Crunchtime Support,

We are working on our Paylocity integration and have completed the following required UDAs:

- PY_API_URL
- PY_COMPANY_ID
- PY_INTEGRATION_ENABLED

Here is our site name (*sample site*): https://xxx.net-chef.com/

Please test our connectivity.

Thank you."

Results

Crunchtime will test the connectivity and then respond to confirm this has been done.

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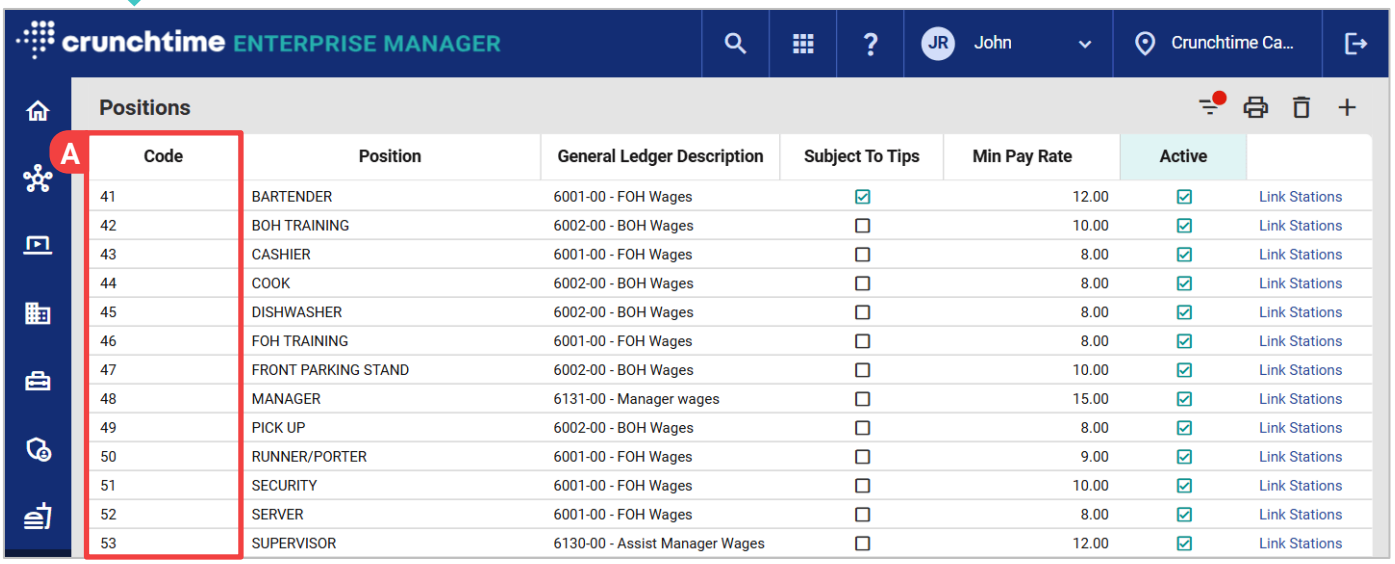
Master Data Setup

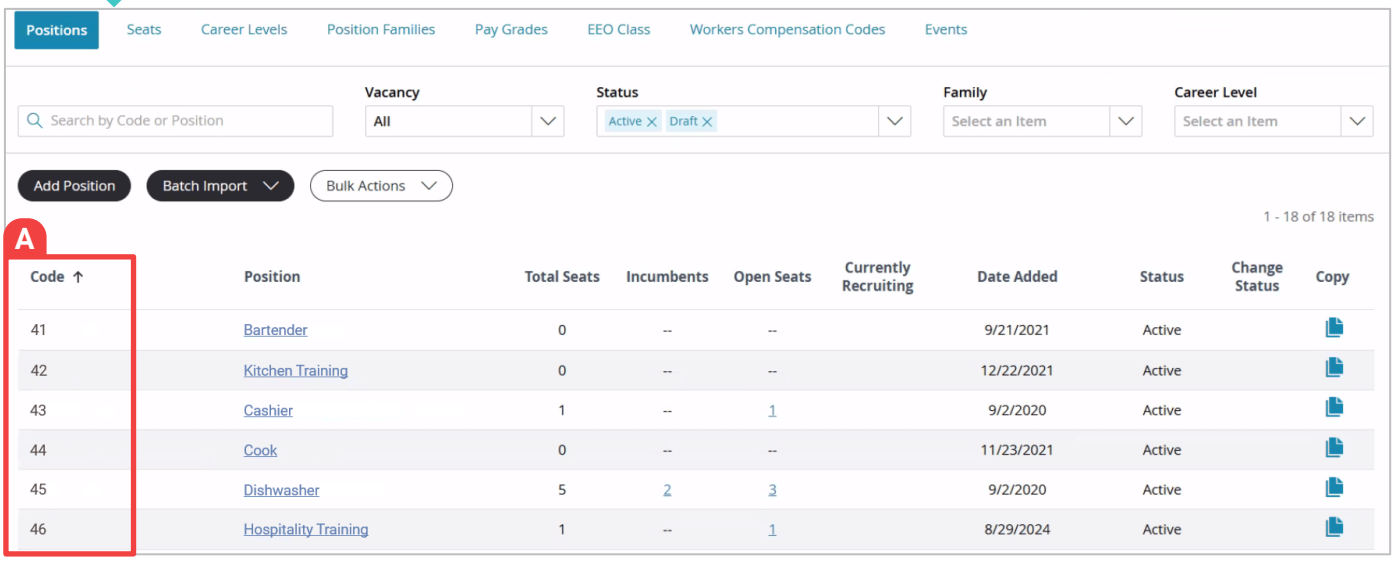
Position Codes defined in Crunchtime must be matched against corresponding entries in Paylocity before running any integration processes.

Match Positions

Enterprise Manager > Labor: Positions



Paylocity > HR > Positions



A Verify that the *Code* for the Positions in Crunchtime and Paylocity match exactly.

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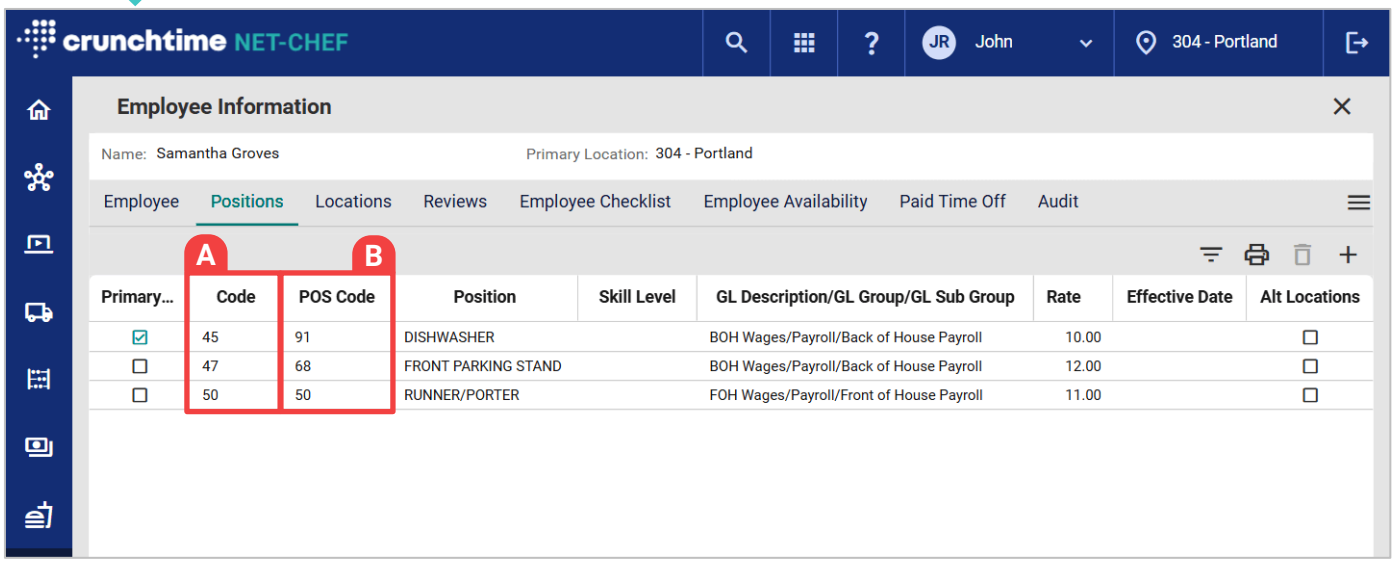
Paylocity Integration

Master Data Setup (Continued)

Match Positions (Continued)

The Position Codes can are also displayed in the Employee records in Net-Chef, along with their corresponding POS Codes.

Net-Chef > Labor: Employee Maintenance > {Edit} > Positions tab



A This column shows the Position *Code* as defined in Enterprise Manager (see previous page).

B This column matches them to the *POS Code*, which is the code number for the Position in the POS System.

If the Position Codes defined in Crunchtime do not match the corresponding entries in Paylocity, Crunchtime will create a mapping between them in the database. You will need to provide Crunchtime Support with a list of the Position Codes from both systems using the worksheet linked below.

Position Code Mapping Worksheet: https://links.crunchtime.com/PositionCodeMappings

Download the worksheet, delete the sample data, fill it out with your data, and attach it to a Support ticket with the subject “Paylocity - Create a mapping for Position Codes.” Our Support Team will take it from there.

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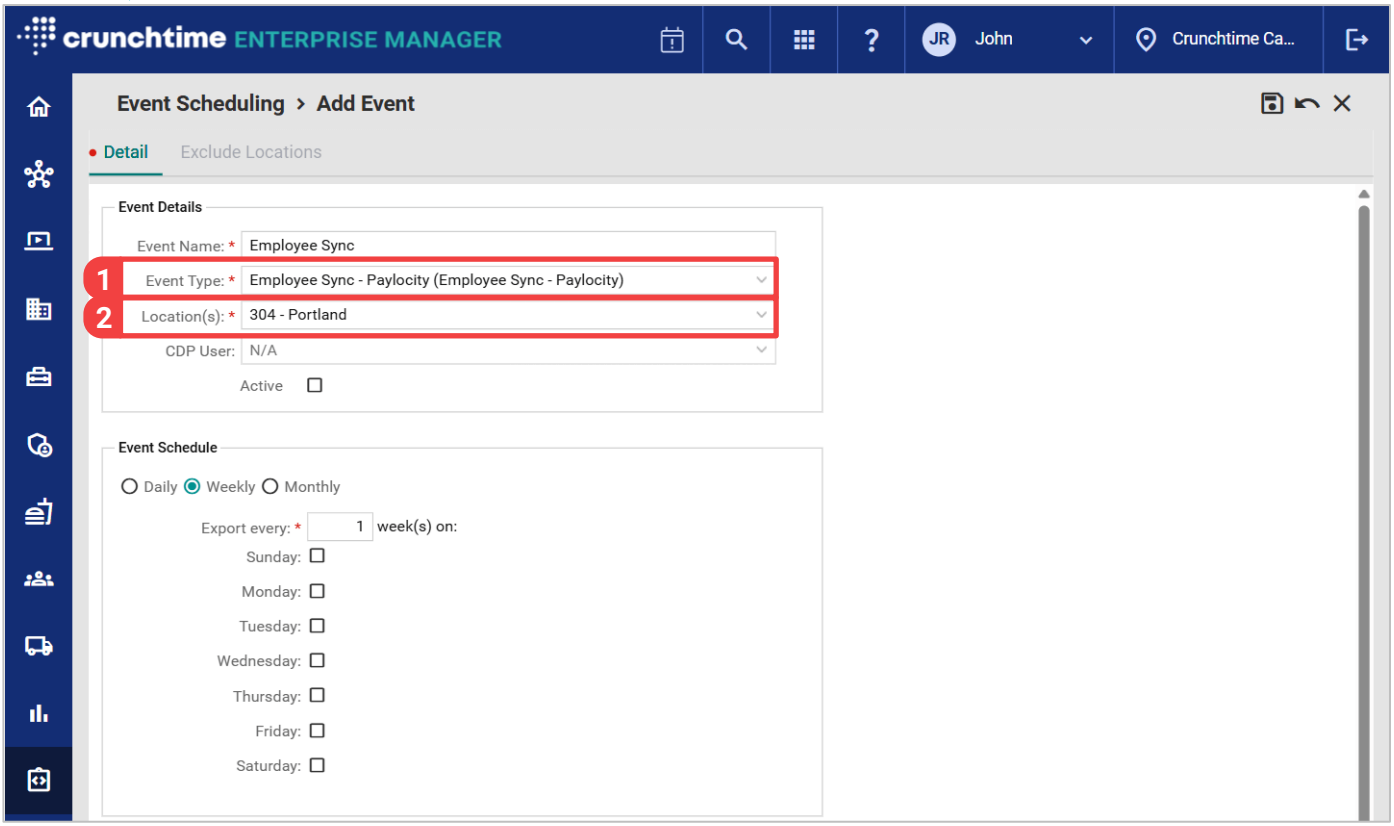
Schedule the Employee Sync

Schedule an Event

In order to receive the Employee Sync data from Paylocity, you must schedule this in Enterprise Manager.

Note: This screen is typically used to schedule exports, but here this step is necessary to establish the connection that allows data to be pushed from Paylocity to Crunchtime.

Enterprise Manager > Interfaces: Event Scheduling



1. For the *Event Type*, select **Employee Sync – Paylocity**. (Hint: Filter the field by entering "payl".)
2. Select any *Location* to export data for all locations associated with the user's hierarchy.

Reminder: Users can be associated with more than one Hierarchy, but only locations associated with the one set to "Limit Export Locations" in the Application User's record will be available here.

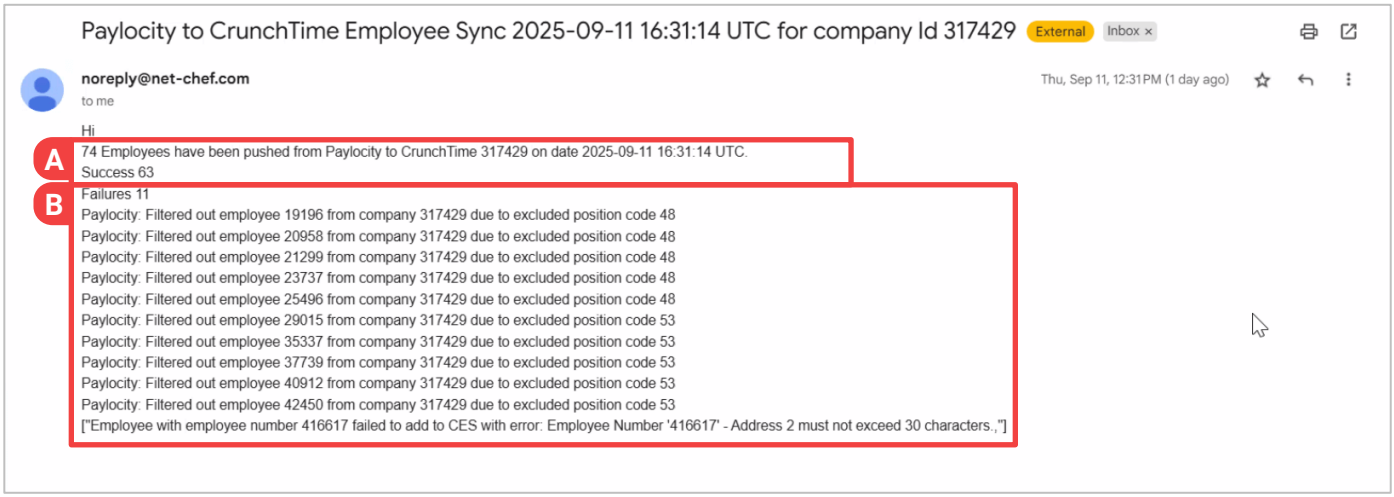
Note: Once the integration runs as scheduled, you will receive a success/failure email; see the sample email on the next page.

Paylocity Integration

Sample Confirmation Email

The following screenshot shows a sample email confirming the success of and indicating the failure of data pushed from Paylocity to Crunchtime.

Sample Email



A This record shows the successful push for the related employee records.

B These records show the failed push for the related employee records and indicate the reason.

Note: This notification will be sent to the Email address(es) defined for the “PY_EMAIL” Company UDA, as shown on page 7. If you do not receive an email within an hour of the event, please contact Crunchtime Support.