Company Configuration

Utilize these instructions to configure your company invoices, billing, & payroll.

Click Settings from the left-hand menu, then click the Company tile.

The General Info page sets up the information for invoices, please enter:

- ➢ Company name, address, phone, email, website, and time zone.
- ➢ Add a confidentiality statement.
- ➢ Enter your Federal EIN, NPI#, Medicaid (if applicable), and week start day
- ➢ Click into the logo box, upload a file with a picture of your company logo
- ➢ Click Save icon in the upper right-hand corner.

Select the down arrow on the top of the page, next to "General Info", select Payroll.

- ➢ Enter the mileage, holiday, OT, and bonus rates to be paid.
- ➢ Set parameters for Weekly OT and Bonus rates.
- ➢ If applicable – set sick accrual parameters for the company.
- ➢ Click Save icon in the upper-right hand corner.

Select the down arrow on the top of the page, next to "Payroll", select Billing.

- ➢ Enter the mileage, holiday, OT, interest fee, late fee and bonus rates.
- ➢ Complete Miscellaneous, Private Invoice, Facility Invoice, and Sales Tax sections.
- ➢ Click Save icon in the upper-right hand corner.

Optional – If your company resides in CA, NV, or CO – please select the down arrow next to "Billing", select Specialized Billing and Payroll.

- ➢ Complete only the OT Rules for the state your company resides
- ➢ Check the boxes to "Apply for Payroll" and "Apply for Billing".
- ➢ Click Save icon in the upper-right hand corner.

855-55-Swyft (855-557-9938)
Support@SwyftOps.com