Intellex Access to Toast Payroll

Use the following email: clientlogin@intellexaccounting.com

1. Log onto Toast Payroll and navigate to *Management > New Hire*.
2. Select the *Add+* button in the top-right corner.
3. Enter "Intellex" as the *First Name,* and enter "Accounting" as the *Last Name*. All other fields are required, but since Intellex will not be getting paid through Toast Payroll, any random options can be selected for *FEIN, Position, Work Tax Location, Template,* and *Hire Date.*
4. Select *Hire*.
5. Toast will now load Intellex' New Hire steps. Select *Next* at the bottom of the *Demographics* step.
6. Enter clientlogin@intellexaccounting.com as the email address and select *Next*.
7. Select *Cancel* on the following page or navigate to *Management > New Hire* again to continue. On the New Hire Dashboard, Intellex will be on top of the list. Select the *yellow pencil* icon.
8. In the pop-up, select *Mark new hire as complete* and choose *Confirm*.
9. Select *Complete* on the next pop-up to confirm the action.
10. The user profile will no longer appear on the New Hire Dashboard. Intellex will now be in the system, so we want to configure the *Employment Status* and *Security Role*. First, use the *Search employees* bar to locate Intellex' profile.
11. From Intellex' profile, select the *Profile Settings* button in the lower-left corner.
12. Change the *Employment status* to *Demo Employee*. Select *Save Changes* to apply this to Intellex' profile. This ensures Intellex will not be counted among active employees who Toast Payroll invoices for.
13. Now select the *Jobs & Pay* tab near the top. Select the *Edit* button in the top-right corner to advance to the Position page.
14. When edits are made to the Position page, a *Reason* is required. We recommend selecting Administrative Update for this situation, but see this page for more details about each information type. Additionally, be sure to change the *Security Role* to *HR+* to allow Intellex full access to the system, each report, and all employees. Learn more about security roles here.
15. Now scroll down and look to change the *Job, Salary Type,* and *Default Earning Type*. This information may have already been filled in if the position has default settings. Once again, the choices made are unimportant since Intellex is not being paid through the system. Select *Submit* towards the bottom of the page to finalize.
16. Lastly, navigate to the *Profile* tab and select the *User Account* button from the left side.
17. As long as the correct email address was entered in step 6, you only need to select *Resend* here.

18. Pressing the ***Resend*** button will send a "welcome" email to Intellex to register our password. Once we do this, we can login to Toast Payroll and use the system right away.