



HARMONY SETUP MANUAL

PAYMATE SOFTWARE CORPORATION

V.1.0

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Common Icons and Symbols

Refer to the table below for common icons, buttons, and symbols throughout Harmony.

Icon Image	Description
	User Settings. Click this button to navigate to your user settings.
	Save button. Click this button to save all your changes for the current page.
	Delete button. Click this button to delete the item from the database.
	Three (3) dots icon. Click this icon to select an item from a list to view details.
	Toggle. Click this toggle to activate/deactivate an item.
	Refresh button. Click this button to refresh your selection.
	Import button. Click this button to import a completed interface.
	File location icon. Click this icon to identify the location of a file from your local computer.
	Checkboxes. Click it to check or uncheck the box.
	Print button. Click this button to print the item.
	Email button. Click this button to email the item.
	Download button. Click this button to download the item. It will automatically be downloaded to your browser's default downloads folder.
	Search icon. Use the search bar to search for specific items or employees.



Welcome to Harmony

Harmony is a hosted application available for the U.S. and Canada. The hosted nature of this software means all your data is stored on the cloud for easy access. You can access it with any browser; including Microsoft Edge, Mozilla Firefox, Google Chrome, Safari, and more. Harmony conveniently lets you add and access an unlimited number of companies with a single login. Due to its modular nature, Harmony works well with a single module or with all its modules, including Payroll, Time and Attendance (T&A), Human Resources (HR), and Employee Self-Service (ESS).

Logging In

Paymate will provide you with your credentials to your 'supervisor' account. This account will have all read/write permissions. To log into Harmony, enter in your credentials and click "**Login**". It is recommended that you change the password to your 'supervisor' account as soon as possible to increase the security of your account, especially if you have begun to set up or restore live company data into your database.



Payroll

Human Resources

Time and Attendance

Employee Self-Service



1(866)-729-6283 x1
support@paymatesoftware.com

Welcome to Harmony. Please log in.

Username

Password

Remember Me

[Forgot Password](#)



Setting Up Your Company

Paymate will set up your company for you. If you require additional companies to be set up or if you would like to delete a company, please contact Paymate Support.

Company Information

The Company Information screen has two sections: Company Details and Contact Person Details.

1. Navigate to Setup > Company.
2. Make the applicable changes.
3. Click the save icon to save your changes.

Company Details

You need to enter your company's legal name, location, and contact information. It is important to ensure this information is accurate as this will appear on your tax forms and other official documents produced by Harmony.



The country that you specify as your location will have no bearing on the taxation setup options that will be available in the Payroll module of Harmony. Taxation is determined during the setup of your Payroll module.

The screenshot shows the 'Company details' form in the Harmony software. The form is titled 'Company details' and is located under the 'Setup' menu. The form contains the following fields:

Company name	Paymate Software Co-op		
Address	30 Werthiem crt		
	Richmond Hill		
City	Toronto	Postal code	M1A2S1
Province	Ontario		
Country	Canada		
Company phone	798465132	Extension	231
Fax	9057711155		
Company email	support@paymatesoftware.com		
Company website	http://www.paymatesoftware.com		

You will notice that the “Company Name” is identical to the descriptive company name you created earlier, but you will need to change this field to your company’s legal name if it is different. All fields are required, excluding “Extension”, “Fax Number”, “Company Email”, and “Company Website”.



Depending on the country you choose, (i.e. U.S. or Canada), this will affect how you will enter your ZIP/Postal Code. If the U.S. is selected, you will be required to input five (5) numbers. If Canada is selected, you will be required to input a combination of six (6) letters and numbers.

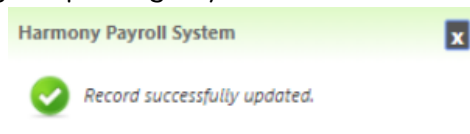
If you see a small red circle with an exclamation point (!), hover your mouse above it and the system will provide an explanation of the issue. Next, let's look at your Contact Person Details section.

Contact Person Details

Here, you will need to enter the information for your primary contact person, including their full name, position, phone number, and extension (if necessary). After you have completed all the fields, click on the icon to save.

The screenshot shows a dark blue navigation bar at the top with a user profile icon, the email address 'sales@paymatesoftware.com', a gear icon for settings, and a 'Log out' button. Below the navigation bar, the 'Contact person details' section is displayed. It features a title 'Contact person details' and a save icon. The form contains the following fields: 'First name' (a single text input), 'Last name' (a single text input), 'Position' (a single text input), 'Telephone' (a text input), and 'Extension' (a text input). The 'Telephone' and 'Extension' fields are positioned side-by-side.

A window will pop up to inform you if you have successfully saved or not. A similar window will appear when you're adding or updating any records within Harmony.



Updating Your Company Details and Contact Person Details

You can return to this screen to change or update your company information at any time, by going to the Configuration settings in Harmony.

1. After logging into Harmony, navigate to Configuration > Setup > Company Information.
2. Change the required information.
3. Click the save icon to save your changes.



Departments

Multi-Tiered and Single-Tiered Structures

Determining if you require a multi-tiered, single-tiered, or no company structure early is a very important step in the setup. This simple configuration setting will help you as you progress in your software setup and day-to-day operations. You can always add new Departments and/or Sub-Departments if necessary.



Make sure you have read the Departments and Locations sections of this document.

The Departments screen has two parts: Departments and Managers of Departments. Adding managers of your Departments should be done after your employees have been added into Harmony.

Adding Departments

1. Navigate to Configuration > Setup > Departments.
2. Click “+ New Department” to add a department.

3. Enter all required information (i.e. “Code” and “Name”). All fields are alphanumeric. If you have already added your employees to Harmony, you can identify the managers of the Department as well. Simply check off the employee(s) who are the managers of this Department.

4. Click the save icon to save your changes.



Adding Tiered Departments

You can add an unlimited number of Departments and your Departments can have an unlimited number of sub-tiers or sub-Departments. When adding tiered Departments, remember to keep the nested tiers relevant to each other.

1. Navigate to Configuration > Setup > Departments.
2. Click the plus sign next to the department (“+”) to add a new tier.

Note: Depending on which tier you want to add to, click on the “+” on the preceding tier.

Code	Name	Managers		
1000	Main		+	🗑️
2000	Support		+	🗑️

3. We can now see two different tiers, one nested under the other. The next section of this manual will provide an example.

If our Departments have nested tiers to four levels:

- Code 1000 is level 1
- Code 2000 is level 2 and is nested under Code 1000.
- Code 2010 and 2020 are level 3 and are nested under Code 2000.
- Code 2010A, 2010B, and 2010C are level 4 and are nested under Code 2010.

Code	Name	Managers		
1000	Main		+	🗑️
2000	Support		+	🗑️
2010	Specialist Support		+	🗑️
2010A	Clarity support		+	🗑️
2010B	Acclaim support		+	🗑️
2010C	Harmony Support		+	🗑️
2020	Database support	PORTER, JAMES	+	🗑️

Deleting Departments

To delete a Department that you may no longer use or need, follow these steps:

1. Navigate to Configuration > Setup > Departments.
2. Select and double-click the department you want to delete.
3. Click the trashcan icon. The Department has been removed from the system and will no longer be available.



You will not be able to delete a Department if it (a) has existing sub-tiers, and/or (b) is related to any operation, such as being assigned to an employee or a pay run. If (a), you will need to delete your sub-tiers before deleting the Department.



Locations

Locations are useful to organize the company without creating segmentation. Not all companies will require locations. Creating Locations are very similar to [Departments](#), as discussed in the previous section of this document.



Make sure you have read the [Departments](#) and [Locations](#) sections of this document.

Multi-Tiered and Single-Tiered Structures

Like Departments, determining if you require multi-tiered, single-tiered, or no Location structure early is a very important step in the setup. This simple configuration setting will help you as you progress in your software setup and day-to-day operations. You can always add new sub-Locations if necessary.

Adding Locations

1. Navigate to Configuration > Setup > Locations.

The screenshot shows a user interface for managing locations. At the top left is a '+ New Location' button. To its right is a search bar with a magnifying glass icon and a '--filter by' dropdown menu. Below these elements are two dropdown menus: one labeled 'Code' and another labeled 'Name'.

2. Click “+ **New Location**” to add a Location. This will be a first-tier Location.
3. Enter the required information.
4. Click the save icon to save your changes.

The screenshot shows a 'Location Detail' form with the following fields:

Code	200
Name	Toronto
Description	Head Office

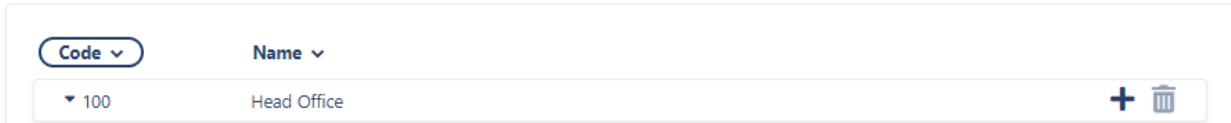
A red square icon with a white save symbol is highlighted at the bottom right of the form.



Adding Tiered Locations

You can have tiered Locations, in the same way that you can have tiered Departments. Likewise, you can have an unlimited number of Locations and an unlimited number of sub-tiers or sub-Locations.

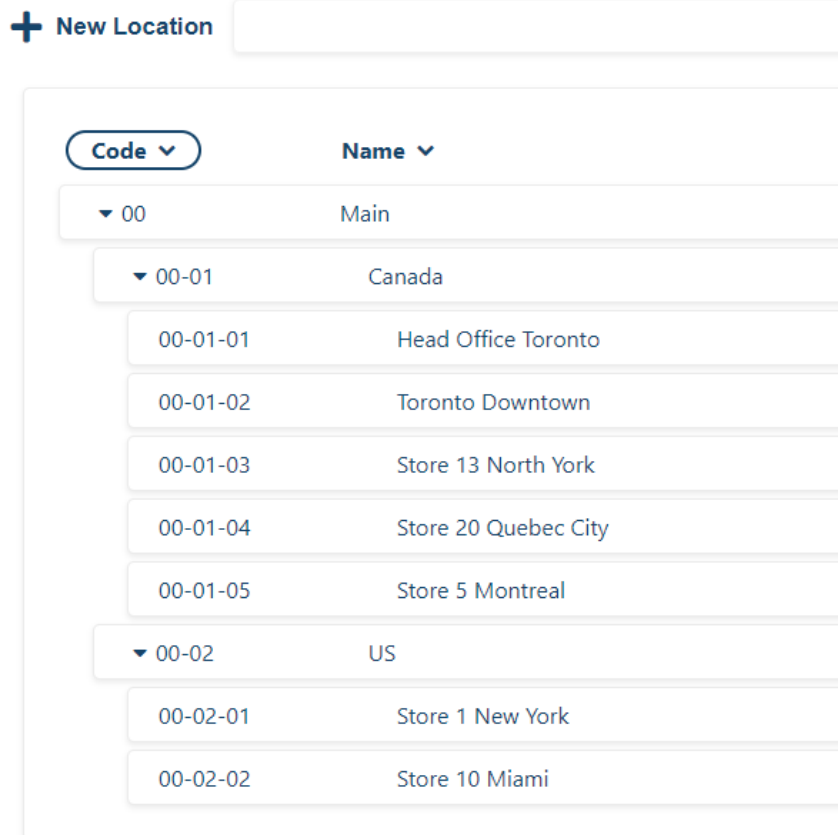
1. Navigate to Configuration > Setup > Locations.



2. Click the plus sign (“+”) next to the Location to add a new sub-tier.
Note: Depending on which tier you want to add to, click on the “+” on the preceding tier.
3. Enter the required information. All fields are alphanumeric.
4. Click the save icon to save the Location. Refer to the example below for more information.

The example below displays nested tiers to three levels:

- Code 00 (Main) is level 1
- Code 00-01 (Canada) and 00-02 (US) are level 2 and are nested under Code 00.
- Code 00-01-01, 00-01-02, etc. are level 3 and are nested under Code 00-01.
- Code 00-02-01 and 00-02-02 are level 3 and are nested under Code 00-02.

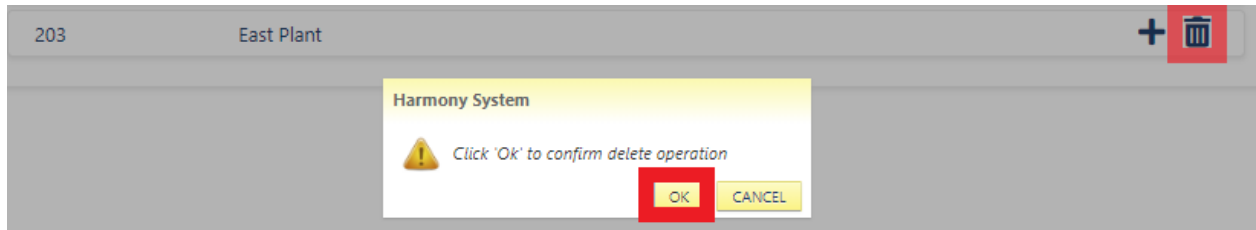




Deleting Locations

To delete a Location that you may no longer use or need, follow these steps:

1. Navigate to Configuration > Setup > Locations.
2. Select and double-click the Location.
3. Click the trashcan icon.
4. Click **“OK”**. The Location will be removed from Harmony and will no longer be available.



You will not be able to delete a Location if it (a) has existing sub-tiers, and/or (b) is related to any operation, such as being assigned to an employee or a pay run. If (a), you will need to delete your sub-tiers before deleting the Location.



Holiday Calendars

Holiday calendars can be set up based on your organizational needs. While most organizations only need one, you may require more. Calendars can be assigned to employees in the Time and Attendance module of Harmony.

When are multiple holiday calendars needed?

Multiple holiday calendars are used when there is a need to differentiate dates between groups of employees. For example, if your employees are located in different states or provinces, or if your employees have different holiday schedules in the organization, then multiple holiday calendars may be useful.

Adding Holiday Calendars

When creating a Holiday Calendar, make sure to have a copy of the state or provincial legislation handy for reference. Follow these steps to create a new calendar:

1. Select Configuration > Setup > Calendar.

<input type="checkbox"/>	Name	Country	Province/State	

2. Click “+ **New Calendar**” to add a new holiday calendar.
3. Enter the required information. Depending on the country you selected from the dropdown menu, the appropriate states, provinces, or territories will appear in the “Province” dropdown field.
4. Click the save icon to save your changes. This will save a ‘shell’ of the calendar (not yet populated with official holiday dates).

Add Holiday Calendar ×

Name

Country

Province



It may be useful to set up a calendar for each state, province, or territory in which you have employees residing in. This will cover any differences, if any.



5. Select the Holiday Calendar you wish to populate.

Holiday Calendar

Name:

Country:

Province:

Edit Holiday

Name:

Date:

Non-Statutory Holiday

Half-Day

Description:

6. Click on “Add Holiday”.

7. Enter the required information.

- “Name”: The name of the holiday.
- “Date”: The date of the holiday.
- “Non-Statutory Holiday”: Indicates that this holiday is not required for an employee to take off, as per government legislation. If this holiday is provided outside of this governmental requirement, then check off this box.
- “Half-Day”: Indicates that this holiday is only for the duration of a half working day rather than a full working day.
- “Description”: Describes the holiday.

8. Click the save icon to save your changes. Repeat this process until all days required to be in the Holiday Calendar have been added and saved.

Holiday Calendar

Name:

Country:

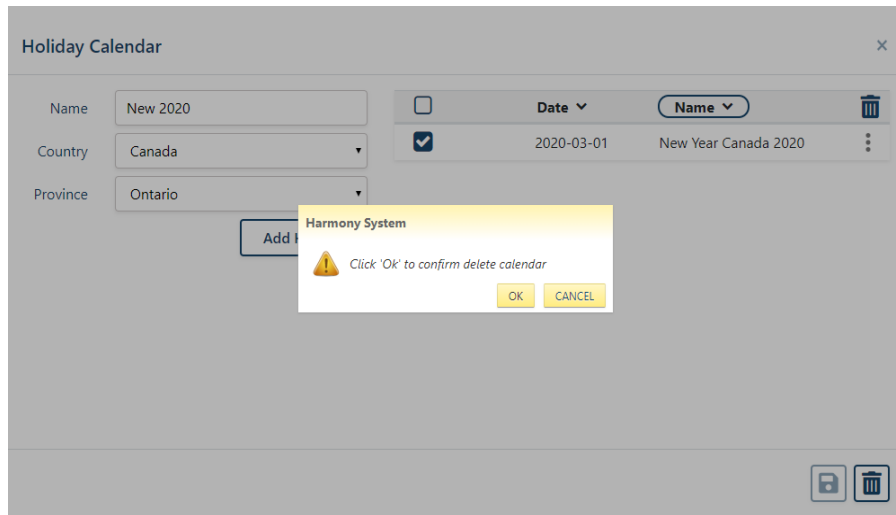
Province:

<input type="checkbox"/>	Date	Name	
<input type="checkbox"/>	2020-12-26	Boxing Day	⋮
<input type="checkbox"/>	2020-07-01	Canada Day	⋮
<input type="checkbox"/>	2020-12-25	Christmas Day	⋮
<input type="checkbox"/>	2020-09-07	Labour Day	⋮
<input type="checkbox"/>	2020-08-03	Simcoe Day- Civic Holiday	⋮
<input type="checkbox"/>	2020-10-12	Thanksgiving	⋮



Deleting a Holiday Calendar

1. Navigate to Configuration > Setup > Calendar.
2. Select the calendar you wish to delete.
3. Click the trashcan icon to delete the calendar. Harmony will prompt you to confirm this deletion.



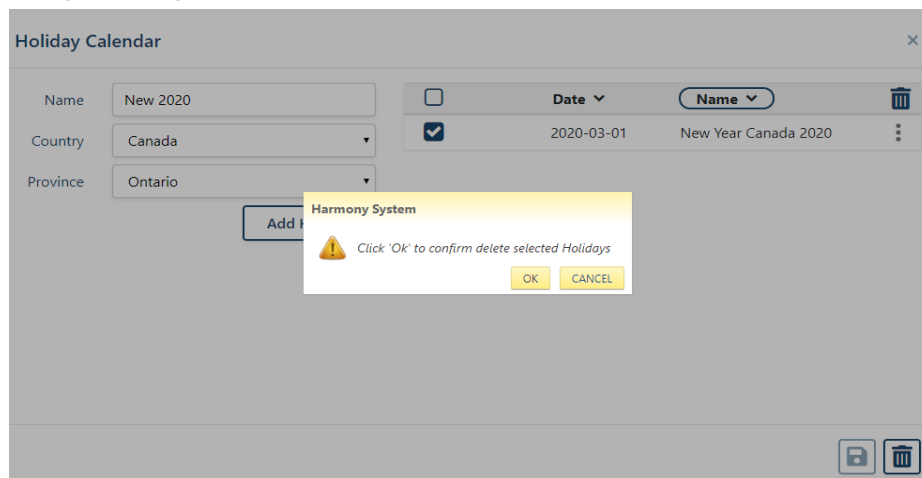
4. Click “OK” to delete the calendar.



This will delete the entire holiday calendar **and** its holidays. To delete a single holiday from a calendar, please continue onto the next section.

Deleting a Holiday from a Holiday Calendar

1. Navigate to Configuration > Setup > Calendar.
2. Select the calendar that you’d like to delete a holiday from.
3. Select the holiday you wish to delete by checking off the box next to it.
4. Click the trashcan icon to delete the holiday from the calendar. Harmony will prompt you to confirm this deletion.



5. Click “OK” to delete the holiday.



Email Settings

The Email Settings page is where you will set up your core email functions. You will need various information from your IT department to complete this set up. These settings will allow you to send emails from Harmony to your employees, if needed, such as their pay stubs or other notification emails. You will also be able to add email templates here.

1. Navigate to Configuration > Setup > Email Settings.
2. Complete all required fields.

Email Settings

Server address	<input type="text" value="smtp.office365.com"/>
Server port	<input type="text" value="25"/>
Sender's name	<input type="text" value="Support"/>
Sender's email	<input type="text" value="support@paymatessoftware.com"/>
Username	<input type="text" value="support@paymatessoftware.com"/>
Password	<input type="password" value="....."/>

Use TLS

- “Server Address”: The host or IP address of your SMTP server (e.g. smtp.mycompany.com)
 - “Server Port”: By default, the server port is 25. But depending on your company security, this number can be different.
 - “Sender’s Name”: The name of the person who will be sending your emails. This can be a real person in your company, but can also be something generic, such as your organization name.
 - “Sender’s Email”: The email of which will be sending the emails on behalf of. Similar to the sender’s name, this can be the email address of one particular person, or something more generic.
 - “Username”: This field is required if “Use TLS” is checked off.
 - “Password”: This field is required if “Use TLS” is checked off.
 - “Use TLS”: Transport Layer Security; cryptographic protocols designed to provide communications security over a computer network. Ask your IT department if this should be checked off.
3. Click **“Update”** to save your changes.
 4. We recommend you click **“Send Test Email”** to ensure that your connection and email settings are set up properly. After sending a test email, ensure that you received the test email before going live with your email setup.



System Preferences

System Preferences are built into the system to allow for uniform formatting of certain types of data, like date and time, or to allow for default settings for your employees. Setting these up properly the first time can help speed up and minimize data entry later.

Your System Preferences are broken down into two sections: General System and Employee settings. The first part, General, is where most of your data formatting will take place. The formatting controls how you see the data. The second section, Employee, is where your employee-related default settings are defined.

General System Preferences

1. Select Configuration > Setup > System Preferences.

System Settings

Time format	hh:mm tt ▼
Clock format	AM/PM ▼
Date format	MM/dd/yyyy ▼
First day of the week	Sunday ▼
Name display format	Surname, firstname ▼
Default holiday calendar	Ontario Calendar ▼

2. Select the formats that work best for you. A default holiday calendar can be selected here to apply to your new employees but can be overwritten for individual employees as needed in your Time & Attendance module.
3. Click the save icon to save your changes.




Employee System Preferences

1. Navigate to Configuration > Setup > System Preferences.
2. Select your default settings that work best for you. These settings will impact new employees as they are added into Harmony and will be used when reviewing your data.



If you are an organization that operates in multiple countries and/or states/provinces/territories, it can be helpful to choose the country and state/province/territory in which the majority of your employees will be employed.

support@paymatesoftware.com  [Log out](#)

Employee Settings

Default country

Default province/state

3. Click the save icon to save your changes.



Employees


Creating employees occurs in Harmony's configuration and all created employees will automatically be brought into each module. However, Harmony Payroll is the only module that requires activating the employee to exclude employees that may not be a part of your payroll.

The employee profile can be broken down into two (2) sections:

I. Employee Personal Information

The fields in this section include basic personal information about your employee.

Employee Details **Personal Information**





Fernandes, Thomas
0109
QA Specialist
6496322656
Head Office Toronto, Canada
BDA Engineer
15-Jul-1998

First name	Thomas
Middle name	
Last name	Fernandes
Title	Mr.
Gender	Male
Date of birth	07/15/1998 <input type="checkbox"/> Is birth date certified
Place of birth	Brampton-Ontario
S.I.N.	648963265
Marital status	Single
Home phone	6496322656
Cell phone	6495993226
Pager	
Personal Email	thomas@democompany.com
Address	66 Dufferin St



II. Job Information

The fields in this section relate to the employee's employment at your organization.

 **Job Information** 

Employee #	<input type="text" value="0109"/>	
Job title	<input type="text" value="QA Specialist"/>	
Employment status	<input type="text" value="Active"/>	
Employee type	<input type="text" value="Full-Time"/>	<input type="button" value="View All"/>
Start date	<input type="text" value="06/14/2017"/>	
Termination date	<input type="text"/>	
Last hire date	<input type="text" value="06/14/2017"/>	
Work phone	<input type="text"/>	Ext. <input type="text"/>
Work email	<input type="text" value="thomas@demo.com"/>	
Department	<input type="text" value="BDA Engineer"/>	
Work location	<input type="text" value="Head Office Toronto"/>	

- “Department” and “Work Location” are useful in reporting, filtering information, and exporting to your GL accounts in Payroll.
- “Work Email” may or may not be the employee's organizational email address. This will be required if you will be emailing the employee their pay stubs and tax slips by email.
- “Alternative manager” and “Is a Manager” fields will be applicable in your Time & Attendance and Human Resources modules.



Employee Types

Employee types indicate the different kinds of employees you have within your organization, such as hourly employees, commissioned employees, full-time employees, seasonal employees, etc. While it is helpful in information filters and grouping your employees, it does not have a direct effect on your Harmony modules. You can define your employees however you like, since it also links to your scheduling and timesheets in your Time & Attendance module.

Adding and Editing Employee Types

1. Navigate to Configuration > Employee > Employees.
2. Under the second section (*Job Information*) in an employee's profile, you will see a field for "Employee Type".
3. Select the "**View All**" button.

Job Information

Employee # 0029

Job title Support Consultant

Employment status Active

Employee type Full-Time **View All**

4. You can edit an existing employee type by clicking the pencil icon or add a new one by clicking the "+ New" button. You can also delete an employee type here by clicking the trash bin icon.

Note: You will not be able to delete an employee type if it has already been assigned to an employee. You must unassign the employee type from the employee before deleting.

Code	Name	
01	Full-Time	
02	Part-time	
03	Student	
04	Seasonal	
05	International Worker	

5. If adding a new employee type, code and name are required. You can also enter a description that is relevant to your employee type. All fields are alphanumeric, which means you can enter in any combination of letters and numbers.

Add Employee Type

Code 06

Name Commission

Description For Commission Employees

Save Cancel

6. Click "**Save**" to save your changes.



Assigning an Employee Type

1. Navigate to Configuration > Employee > Employees.
2. Select the employee you want to assign an employee type to.
3. Under the *Job Information* section is the “Employee Type” field. Select one from the dropdown list.

Employee type

4. Click the save icon to save your changes.



Adding Employees to Harmony

Adding employees to Harmony is very simple. You can manage your employees' basic information from a single screen. Mandatory fields are indicated with a red line. You will not be able to add the employee in the system if you leave these fields empty.

1. Navigate to Configuration > Employee > Employees.
2. Click **+ New Employee** in the top-left corner to add a new employee.

ID	Name	Job title	Department	Location	Status
0029	Macgregor, Scott	Support Consultant	Support	Head Office Toronto	Active
0033	Gomes, Jennifer	Developer Level 2	Programming	Head Office Toronto	Active
0035	Gaylard, Leia	Purchasing Agent	Purchasing	Store 13 North York	Active

3. Complete all required fields.

Employee Details ← Back to Employee List

Personal Information

First name

Middle name

Last name

Title

Gender

Date of birth Is birth date certified

Place of birth

S.I.N.

Job Information

Employee #

Job title

Employment status

Employee type

Start date

Termination date

Last hire date

Work phone Ext.

4. Click on the save icon to create the employee.



Importing Employees

You can easily and quickly add a large number of employees into Harmony by taking advantage of Harmony's importing features. Paymate can provide you with a standard import template, but you can create your own if needed.

Prerequisites to Importing Employees

- At least one (1) import interface must be defined and tested in a sandbox environment
- Have a .CSV file that follows the defined import layout ready to be imported

	A	B	C	D	E	F	G	H	I	J	K
1	50	DAVID	GOMES		2 Bridleridge Gdns S	CALGARY	AB	CAN	T2Y4L3	4039199510	
2	52	STHEFANIE	MOREIRA		37 FRASER ROAD SE	CALGARY	AB	CAN	T2C0X9		
3	53	ALVARO	FERNANDES		23 MIDVALLEY ROAD	CALGARY	AB	CAN	T2X1K5		
4	54	TUNNEY	AMBER		42 CRANBERRY GREE	CALAGRY	AB	CAN	T3M1L4		
5	55	MICHAEL	WHITE		136 SUNTERRA HEIGH	COCHRAN	AB	CAN	T4C1W7	4034831292	

Creating an Employee Import Interface

1. Navigate to Configuration > Employee > Import.
2. Click on “+ **New Interface**” to create a new import interface.
3. Enter your “Exchange Code” and “Exchange Name”. These fields will be the code and name of your interface.
4. Ensure your import interface is active by using the toggle. You can also toggle this off if you decide not to use this interface anymore.
5. If your .CSV import file does not have a header, check off “No header”.
6. Click on “+” to add fields to your interface. “Column ID” refers to the column number of the field in your .CSV import file. For example, in the sample .CSV file image above, column 2 (“B”) will be the employee’s first name.

Column ID	Code
1	Emp008
2	Code

7. Fields with an asterisk (*) are mandatory in Harmony, and so they must exist in your .CSV import file.
8. Once all fields are included, click the save button to save your import interface.



Importing Employees into Harmony

1. Select the appropriate import interface.
2. Click **“Browse”**.

Upload CSV
Select a file
Browse... No file selected.
Upload

3. Select your .CSV import file from your local computer.
4. Click **“Upload”**.
5. If you have duplicate employees in Harmony’s system and the .CSV file you imported, you can overwrite existing information with the newly imported information. Select all or some employees that apply by clicking on the checkbox, left of the employee.

h harmony Setup Employee Security Tools Payroll

Overwrite employees in Harmony from ERP

EMPLOYEES - HARMONY / ERP

Select All

#	EMP Code	Name
<input checked="" type="checkbox"/>	1 52	STHEFANIE MOREIRA
<input checked="" type="checkbox"/>	2 53	ALVARO FERNANDES
<input type="checkbox"/>	3 54	TUNNEY AMBER
<input type="checkbox"/>	4 55	MICHAEL WHITE

Add All

6. After your selection, click **“Add All”**. Your selected employees will be directly imported and added into Harmony.

For more information about importing employees into Harmony, search the [Paymate Knowledge Base](#). If you’re still experiencing problems, please contact Paymate Support.

Tools

Of all the processes performed in Harmony, backing up and restoring your data are the most important. Harmony provides these tools to assist you in protecting and securing your data. Your backups will be saved on Paymate's servers.



Paymate recommends that you create backups regularly as best practice, especially before any action is taken that may be difficult to reverse or could have sweeping implications. This way, you will always have a way to restore a company at any time.

Backing Up Your Data

Backing up your database is done at your own convenience. You can create a backup at any time and as many times as you like. The last backup directory is saved by Harmony for your reference and is to be used for restoring your database.

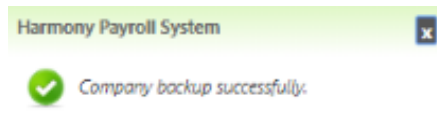
1. Navigate to Configuration > Tools > Company Backup.
2. Confirm that the backup directory location is correct. Make changes as necessary.
3. Enter the name for your backup file.



We recommend naming your file in a way that captures all important information (e.g. "Backup of DB_DEMO_March_20_2020" includes what the file is, the name of the company, and the date of the backup).

A screenshot of the "Company Backup" interface in the Harmony Payroll System. The interface has a dark blue header with the "h harmony" logo and navigation menus for "Setup", "Employee", "Security", "Tools", and "Payroll". On the right side of the header, there is a user profile icon for "Support@Demo.com", a settings gear icon, and a "Log out" button. The main content area is titled "Company Backup" and contains two input fields: "Backup directory" with the value "C:\HarmonyBackup\DB_DEMO" and "Backup file name" with the value "Backup of DB_DEMO_March 20_2020". To the right of these fields is a green progress bar showing "100%". A "Backup" button with a circular arrow icon is located at the bottom right of the form.

4. Click on "**Backup**" to create your backup file. Harmony will notify you if you have successfully backed up your data.





Restoring Your Data

Restoring your data using a backup file is a quick and easy process. It should only take a few minutes to complete, depending on the size of your backup file.

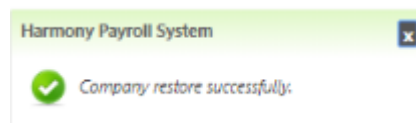
Note: You can only restore your data if you are the user that created the backup file **and** in the same company of which the backup file was created for.



Ensure that **no other users** are logged into Harmony when you are restoring your data. They may log back on after the restoration process is complete.

1. Navigate to Configuration > Tools > Company Restore.
2. Identify the file directory (where your backup file is located on your computer). This is automatically set to the location of which you previously backed up your files (refer to [Backing Up Your Data](#)).
3. Once you have specified the directory, the “Backup File” field will list all the back-up files in that location that you can use to restore your data. Select the appropriate file.

4. Click on “**Restore**” to restore your data. Harmony will notify you if you’ve successfully restored your data.



Restoring a backup will take you back to that moment in time for **EVERYTHING**. **Anything done in the software after the backup was created WILL BE LOST.** Restoring your data must only be done when absolutely necessary.



User Settings

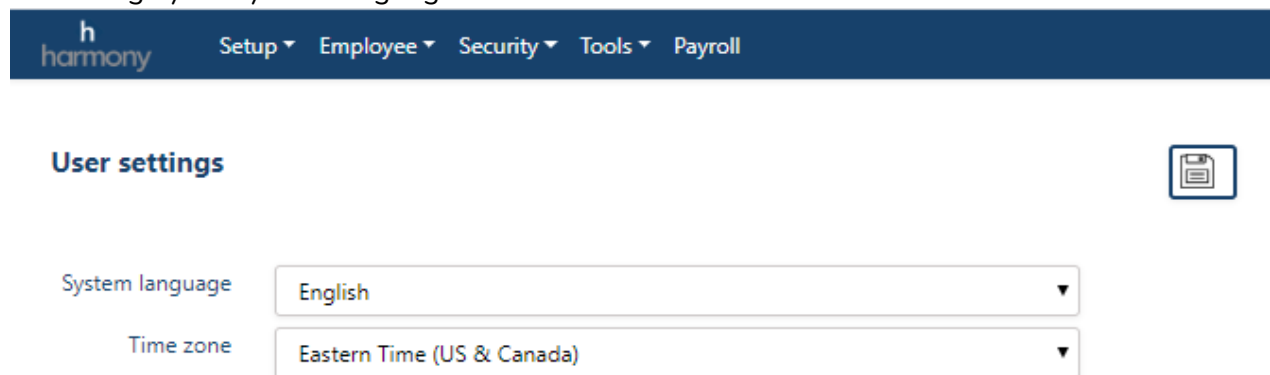
You can adjust your settings, such as changing the system language, time zone, or updating the password for the logged in account in your User Settings.

Changing Your System Language and/or Time Zone

1. Click on the gear icon on the top-right corner to go to your User Settings.



2. Change your system language and time zone if needed.



3. Click the save icon to save your changes.



Changing Your Password

1. Click on the gear icon on the top-right corner to go to your User Settings.




2. On the right side, you can change your password. Enter your current password in the “Current Password” field.
3. Enter in your new password in the next field and enter it again to confirm the new password.

Change password 

Current password

New password

Confirm New password

4. Click the unlock button () to confirm and save your changes. The current logged in user account will now use this new password to log into Harmony. The old password will no longer work.



If you have forgotten your password, please contact your manager or supervisor to provide or change your password for you.



Contact Paymate Support

Before you contact Paymate Support directly, please see our available resources:

Paymate Knowledge Base: <https://helpdesk.paymatesoftware.com/>

Paymate's knowledge base contains a wide variety of help documents, guides, and how-to videos. We highly recommend browsing through our articles to fix an issue you may have.

If you still require additional help with Harmony, please feel free to contact Paymate's support team directly. We will be happy to help you and answer any questions you may have.

Email us: Support@paymatesoftware.com

Call us: 1 (866)-PAYMATE (1-866-729-6283) ext. 1

Visit us: www.paymatesoftware.com/contact