



Getting Started Guide

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Manual Version

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Introduction

Sage Business Cloud Payroll is an online payroll solution.

Sage Business Cloud Payroll is a SAAS product. SAAS is the abbreviation for Software as a Service and is sometimes referred to as "on-demand software". It is a software delivery model in which the software and the user's data are hosted online, and the user uses a web browser to access the software and their data over the Internet.

Sage Business Cloud Payroll aims to provide a cost effective and easy-to-use payroll for the SME market. There is no cap on the number of companies or employees that can be loaded. The payroll functionality that the user requires determines whether Sage Business Cloud Payroll is the payroll solution for them. Sage Business Cloud Payroll currently caters for:

- Monthly, weekly and fortnightly payrolls
- Multiple companies and
- Unlimited employees.

To ensure that the system remains user friendly, easy to use and easy to support, the customisability has been limited. Earnings and deductions and basic calculations (such as overtime) have been pre-defined.

Terminology

Term	Explanation
Hosting Site	The website from which the user accesses Sage Business Cloud Payroll is called the hosting site.
Client	The person who opens an account with Sage Business Cloud Payroll and is liable for paying the account.
User	The person who logs in and processes on Sage Business Cloud Payroll.
User Interface (UI)	The UI is everything that is designed into an information device with which a user can interact. This will include the display screen and the software's appearance on the user's desktop as well as how a website invites interaction and how the user responds to it.
Company	This is the PAYE entity or employer.
Pay Cycle	The pay frequency cycle.
Pay Period	Pay periods fall within a pay cycle. There are thus 12 pay periods (months) in a monthly pay cycle, 26/27 pay periods in a fortnightly pay cycle and 52/53 pay periods in a weekly pay cycle.
Definition	These are all your earnings, deductions, company contributions and fringe benefits. Definitions are pre-defined in Sage Business Cloud Payroll and editing has been limited (e.g. descriptions and multipliers). Templates are used to select which definitions are used in each company.

The Hosting Site

Transaction	We refer to the input that is done on all definitions as transactions. Sage Business Cloud Payroll allows for multiple transactions on each definition.
Views	The different screens in Sage Business Cloud Payroll is referred to as “views”. We thus refer to, for example, the Company Detail view, the Payslip view, etc.
Minimised view	The blue blocks displaying to the right of the screen while another view is maximised.
Tiles	Each employee is displayed in a tile on the employee list.
Expander	Views are divided into different sections, indicated by blue headers and triangles to the left. These sections can be expanded and collapsed by the user.
Switch	The action to move between companies or tax years.

The Hosting Site

Information can be found on the following pages on the hosting site:

- Product Info
 - This page contains general information about Sage Business Cloud Payroll and Sage’s other products and services.
- FAQ
 - This page contains basic questions about Sage Business Cloud Payroll, as well as information regarding Tax, SDL and UIF. This page also has links to registration forms and websites with more information on each topic.
- Contact Us and Support
 - These pages contain all the phone numbers and contact details for Sage Business Cloud Payroll.
- Login
 - This is the page where all existing users log into Sage Business Cloud Payroll. Users can bookmark this page.
 - This page also contains details of what was released in each software update.

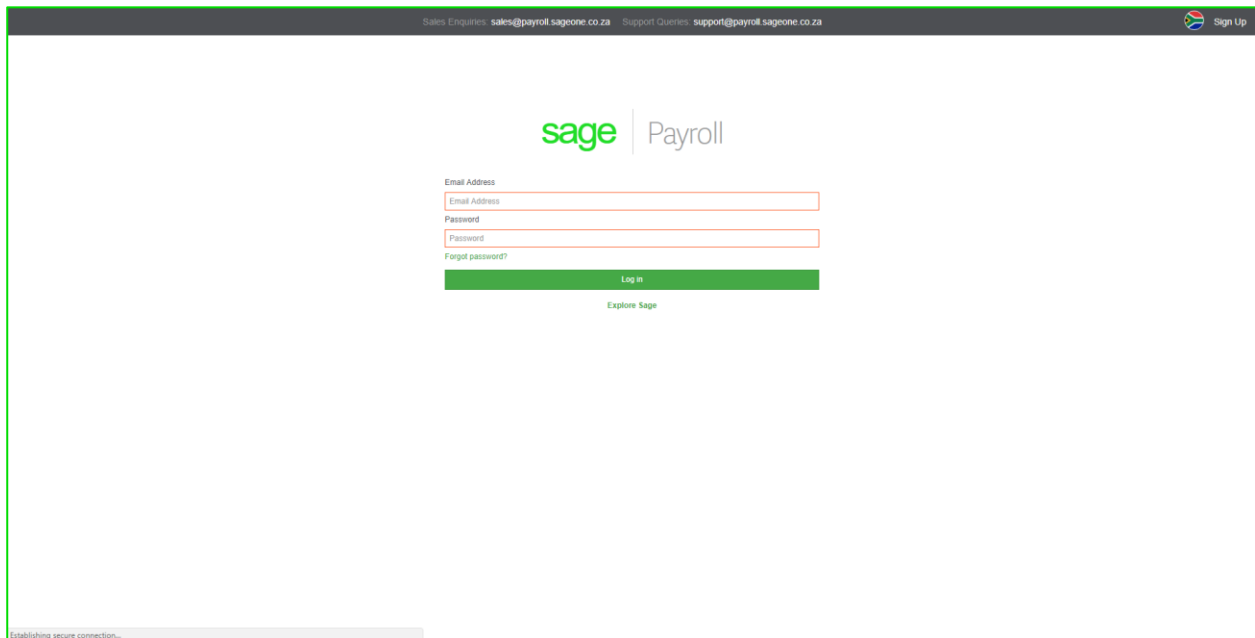
Important Information when Training with this Module

When training this module, advise the learners to sign up using the TRY THE DEMO button, using their own email address. You will be able to go live with the information entered should you wish to, by performing a roll over and entering the information as required.

Getting Started

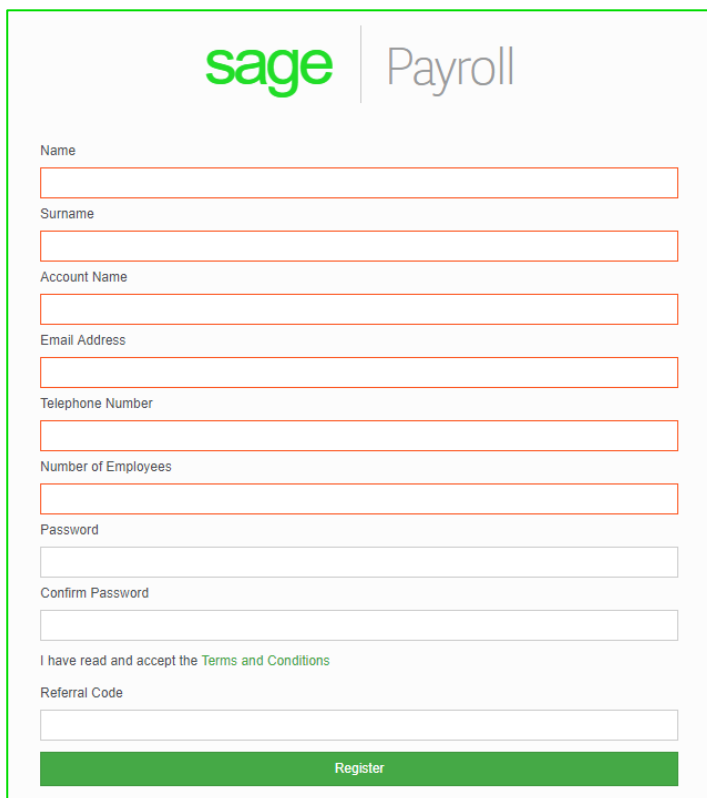
Steps to sign up as a user on Sage Business Cloud Payroll

- Go to the Payroll website: <http://payroll.sageone.co.za/>
- The following screen is displayed:



The screenshot shows the Sage Payroll login page. At the top, there is a dark header bar with the text "Sales Enquiries: sales@payroll.sageone.co.za" and "Support Queries: support@payroll.sageone.co.za" on the left, and a "Sign Up" link on the right. The main content area features the Sage Payroll logo. Below the logo, there are input fields for "Email Address" and "Password", a "Forgot password?" link, and a green "Log in" button. At the bottom of the login section, there is a link to "Explore Sage".

- Click on the **Sign Up** link at the top of the page.
- The following screen is displayed:



The screenshot shows the Sage Payroll registration page. At the top, there is the Sage Payroll logo. Below the logo, there are several input fields: "Name", "Surname", "Account Name", "Email Address", "Telephone Number", "Number of Employees", "Password", "Confirm Password", and "Referral Code". There is also a checkbox for "I have read and accept the Terms and Conditions". At the bottom, there is a green "Register" button.

Getting Started

- Complete the details on the **Sign Up** page. This is the information that will be used as the user's login details.
 - **Your name and surname** – This is the client name and surname.
 - **Account name** – This is the name of your Payroll account (your company name).
 - **Email address** – This is the email address the user will use to log into Sage Business Cloud Payroll. This email Address is also used for all correspondence from Sage Business Cloud Payroll such as activation and reset password emails. It is thus important that an active email address is used.
 - **Number of employees** – Enter the number of employees that you will load on the system.
 - **Password** – The password must be at least 8 characters long and contain at least one upper case letter, one lower case letter and one number.
 - **Confirm password** – The user must retype the password to ensure that the correct password was entered.
 - **Voucher number** – You can enter your voucher number if you have one.
 - **Terms and Conditions** – You can click on Terms and Conditions to read it before checking the check box in order to continue.
- After the details have been entered click on the **Register** button.



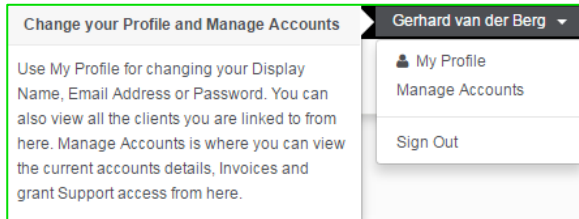
Important Information

Please note that an activation email will be sent to you with a link in it. When you click on this link, you will be prompted to enter your email address and password.

- The registration process is only complete once you have clicked on the activation link. You will not be able to access Sage Business Cloud Payroll before activating your account.

Admin Tasks

Sage Business Cloud Payroll allows you to perform certain tasks to manage your profile and accounts.



My Profile

From the top black navigation bar, click on the drop down arrow next to your email address and select **My Profile**.

The screenshot shows the "My Profile" page. At the top, there are two green buttons: "Change Email Address" and "Change Password". Below them is a section titled "My Details" with two input fields: "Display Name" (containing "Gerhard van der Berg") and "Email Address". Below these is a section titled "Clients I am linked to" containing a table. The table has three columns: "Name", "Site Code", and "Registered On". It lists one client: "Sage One Payroll Training" with site code "W17359" and registered on "19 Jul 2016". At the bottom right of the page are "Undo" and "Save" buttons.

Name	Site Code	Registered On
Sage One Payroll Training	W17359	19 Jul 2016

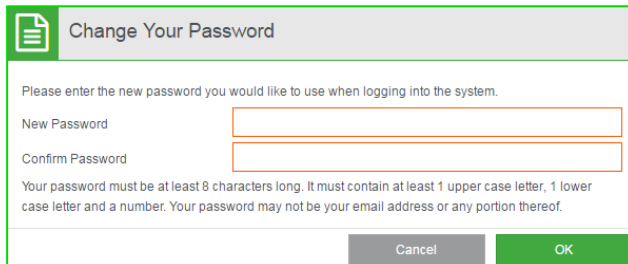
You will be able to edit your details from this view.

- Display Name – The name that will be displayed for this user.
- Email Address – The email address linked to this account.
- Clients I am linked to – The user's information will be displayed here including the site code and the date that the account was registered on.

Admin Tasks

Change Password

Click on the Change Password button. A screen will be displayed allowing you to type a new password. Make sure that your password is at least 8 characters long and contains at least one upper case letter, one lower case letter and one number. You cannot make your password your email address or any portion thereof.



The 'Change Your Password' form has a title bar with a document icon and the text 'Change Your Password'. Below the title bar, it says 'Please enter the new password you would like to use when logging into the system.' There are two input fields: 'New Password' and 'Confirm Password'. Below these fields, a note states: 'Your password must be at least 8 characters long. It must contain at least 1 upper case letter, 1 lower case letter and a number. Your password may not be your email address or any portion thereof.' At the bottom right, there are two buttons: 'Cancel' (grey) and 'OK' (green).

Reset Your Password

If you forgot your password, you can reset it:

- Go to the Sage Business Cloud Payroll website: www.payroll.sageone.co.za
- Click on Login.
- Click on Forgot password? to reset the password.



The login form has a title 'Login' and two input fields for email and password. To the right of the input fields is a green 'Log in' button. Below the input fields, there is a link that says 'Forgot password?'.

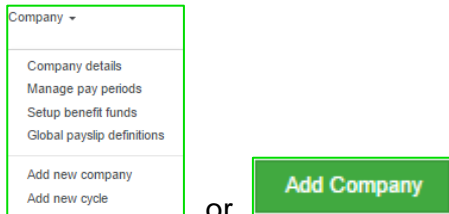
Enter the email address for which the password must be reset.

Add a Company

Add a Company

After successfully signing up and activating an account, you will be prompted to add a company when you first log into Sage Business Cloud Payroll.

- On the main navigation bar select **Company** and then click on **Add new company** or you can click on the **Add Company** button. The following screen is displayed:



- After selecting the option the following screen is displayed:

The screenshot shows the 'Add New Company' screen with the 'Company Details' tab selected. It contains two input fields: 'Company Number' and 'Company Name'. At the bottom right, there are 'Cancel' and 'Next' buttons.

- Enter the registered **Company Name** and also enter a **Company Number** (0001 – 9999).



Important Information

Please note that if you do not select a unique company number, the next available number will be displayed for you.

- Click on the **Next** button. The following screen is displayed:

The screenshot shows the 'Add New Company' screen with the 'Cycle Details' tab selected. It contains a 'Cycle Name' input field, a 'Cycle' dropdown menu, and four checkboxes: 'Exclude from UIF', 'Exclude from SDL', 'Pro Rata Annual Bonus', and 'Exclude from Tax Certificates'. At the bottom right, there are 'Previous' and 'Finish' buttons.

Add a Company

- Add a cycle name (for example, Monthly Salaries), choose a cycle frequency and add the date that the financial year will begin on.



Important Information

Please note that the company tax year start date is automatically set according to the date selected here. If the wrong date was selected and the process was finalised, the date cannot be changed. A new company should be added and the company with the wrong date should be changed to “HISTORY”. To change to history, change the company name on the Company details view.

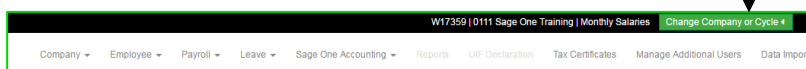
- Click on the **Finish** button once all the information has been entered. The following screen is displayed:

- Enter the company's details as requested on the screen.
- Once all the information has been entered, click on the **Save** button.

How to Switch between Companies or Reach the “My Dashboard” View

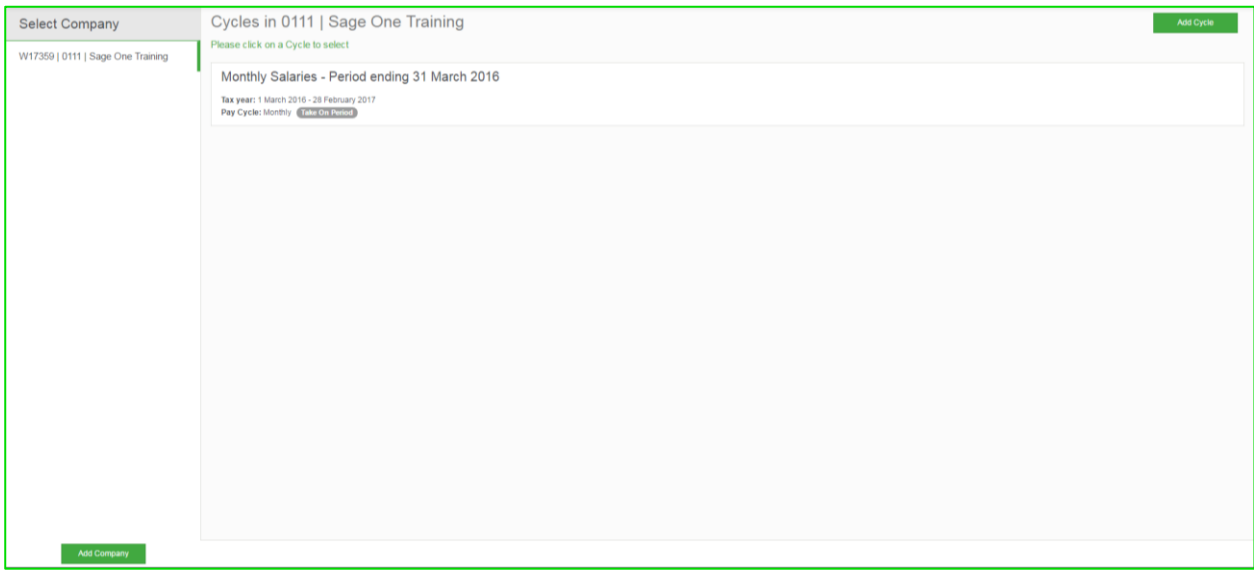
Follow these steps:

- From the **Company Details** view, click on the green **Change Company or Cycle** button inside the black bar at the top of the screen:



Add a Company

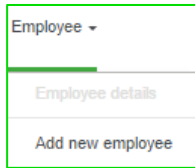
- The following screen is displayed:



- Click on the company and the cycle you wish to switch to.

Add an Employee

- Click on **Employee** in the main navigation bar and select **Add new employee**.



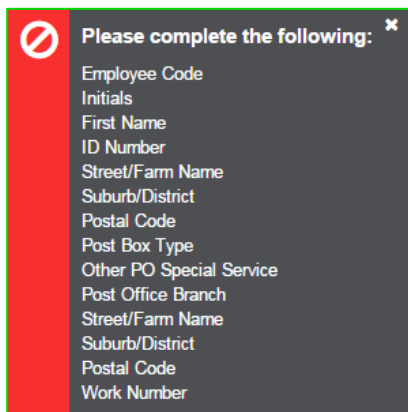
In order to add an employee, Sage Business Cloud Payroll initially only requires 4 fields:

- Surname,
- Date of Birth,
- Date Engaged and
- Tax Status.



Additional Information

Please note that in order to generate tax certificates, Sage Business Cloud Payroll will require all mandatory fields as required by SARS. The following are mandatory fields required before you will be able to generate a tax certificate:



Deleting an employee

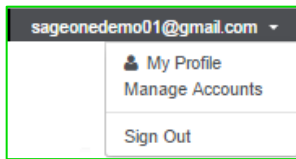
An employee can only be deleted in the first period that you load the employee, by going to the employee's details and clicking on **Delete Employee**.

Ending employment

Ending employment can be done by clicking on the **End Employment** button. This button is available when you click on Employee in the main navigation bar and select Employee details or by accessing the Hours and rates, Employment tax incentive, Payslip, Private benefits, Payslip details or Year to date values from the Payroll selection in the main navigation bar. You will also be able to access it from the Leave option on the main navigation bar by selecting **Employee leave details** or **Employee leave transactions**.

Account Information

- From the main navigation bar click on the drop down arrow next to your user name and select **Manage Accounts**.



- The following screen is displayed:

A screenshot of the 'Manage Accounts' form. The form has three tabs: 'Account details', 'Invoice details', and 'Support'. The 'Account details' tab is active. The form contains several sections: 'W12093 - TestPerson' with a dropdown for 'Person' and a 'Not Registered' checkbox; 'The name of the person that the invoice must be issued to is' with a text field 'TestPerson' and a 'with ID/Passport number' field; 'Please supply an order number, if applicable' with a text field; a checked checkbox 'Default from user details'; 'The contact person for invoice queries is' with a text field 'TestPerson' and a 'and can be phoned on' field with the value '0123456789'; 'Invoices will be emailed to' with the email 'sageonedemo01@gmail.com'; 'Physical/Residential Address' with fields for 'Unit Number' (01), 'Complex Name' (testComp), 'Street Number' (01), 'Street/Parm Name' (testStreet), 'Suburb/District' (testSub), 'City/Town' (testCity), and 'Postal Code' (0001); 'Postal Address' with a checked checkbox 'Default from residential address' and fields for 'Address Line 1' (01 testComp), 'Address Line 2' (01 testStreet), 'Address Line 3' (testSub testCity), and 'Postal Code' (0001); and 'Other Contact Details' with a 'Phone Number' field (0123456789). At the bottom right, there are 'Cancel' and 'Save' buttons.

Client Information has 3 tabs:

- Account details
- Invoice details
- Support

A screenshot of the 'Manage Accounts' form showing the tabs. The title 'Manage Accounts' is at the top. Below it are three tabs: 'Account details' (which is highlighted with a green underline), 'Invoice details', and 'Support'.

Account Information

Account details

Account details contain the details of the person/entity that will be invoiced, the address and contact details. Most of the account details are completed by you during the sign up process. This information can be changed at any time.

The screenshot shows the 'Manage Accounts' interface with the 'Account details' tab selected. The account is 'W12093 - TestPerson'. It includes fields for 'The invoice will be issued to a' (Person), 'which is' (Not Registered), and 'for VAT and the VAT number is'. Below this, there's a field for 'The name of the person that the invoice must be issued to' (TestPerson) and 'with ID/Passport number' (9999999999999999). A checkbox for 'Please supply an order number, if applicable' is present. A section for 'Default from user details' shows 'The contact person for invoice queries is' (TestPerson) and 'and can be phoned on' (0123456789). 'Invoices will be emailed to' (sageoneidm01@gmail.com). The 'Physical/Residential Address' section includes fields for Unit Number (01), Complex Name (testComp), Street Number (01), Street/Firm Name (testStreet), Suburb/District (testSub), City/Town (testCity), and Postal Code (0001). The 'Postal Address' section has a checkbox for 'Default from residential address' and fields for Address Line 1 (01 testComp), Address Line 2 (01 testStreet), Address Line 3 (testSub testCity), and Postal Code (0001). The 'Other Contact Details' section has a 'Phone Number' field (0123456789).

Invoice details

Invoice Details hold all the invoices and the bank details. The unpaid invoices are grouped together, so that you can see which invoices are outstanding.

Invoices are always generated on the last day of the month. You are then billed for all usage during the month.

The screenshot shows the 'Manage Accounts' interface with the 'Invoice details' tab selected. The account is 'W12093 - TestPerson'. The 'Payment Details' section shows 'Payment Reference Number: W12093'. The 'Banking Details' section shows 'Sage HR & Payroll a division of Sage South Africa (Pty) Ltd', 'Nedbank Hatfield', '198 765', '16 02 073 910', and 'Email address for account queries: accounts@payroll.sageone.co.za'. Below this are expandable sections for 'Unpaid Invoice Details', 'Paid Invoice Details', and 'Credit Note Details'. At the bottom, there's a message: 'To view invoices and credit notes you need Adobe Acrobat reader installed.' with a 'Get Adobe Reader' button.

Account Information

Support

You now have the option to give support consultants support access to assist with a query or to do an off-site consultation. This means, the consultant can log into your account without having to ask for your login details.

Manage Accounts

Account details Invoice details **Support**

W12093 - TestPerson

▼ **Support Details**

Contact Details
Email: support@payroll.sageone.co.za
Nationwide: +27 (0)861 777 270
Fax: +27 (0)86 559 9363

Operating Hours
Monday to Thursday: 8am to 5pm
Friday: 8am to 4:30pm
First Friday of every month: 8am to 4pm
Closed on weekends and Public Holidays

▼ **Support Access**

The Support Desk may require access to your software in order to resolve a support query or to do an off-site consultation.
To ensure that your information remains safe, please do not email your username or password to anyone.

You have not granted the Support Desk access to your software.

[Grant access](#)

By clicking on Grant access the following screen is displayed:

▼ **Support Access**

The Support Desk may require access to your software in order to resolve a support query or to do an off-site consultation.
To ensure that your information remains safe, please do not email your username or password to anyone.

You have granted the Support Desk access to your software on 01 September 2015 at 11:50:43 AM. Your current reference number is 237167905c. Access to your software will automatically be cancelled after 24 hours.
You can manually cancel access to your software before automatic expiry.

[Cancel access](#)

Once you click on the Grant access button, the Support desk will have access to your information for 24 hours or until you decide to cancel the access. Once you click on Grant Access you will see the date and time when the 24h session starts. You will also get a reference number for this support session.



Important Information

Please note that you must always log out of the system while the consultant is investigating. If both you and the consultant try to make changes the system will give errors. ALL changes made to the system will be discussed with you and confirmed that it is correct.

Company

To cancel the support session, you can click on **Cancel access** as indicated below:

▼ Support Access

The Support Desk may require access to your software in order to resolve a support query or to do an off-site consultation.
To ensure that your information remains safe, please do not email your username or password to anyone.

You have granted the Support Desk access to your software on 01 September 2015 at 11:50:43 AM. Your current reference number is 237167905c. Access to your software will automatically be cancelled after 24 hours. You can manually cancel access to your software before automatic expiry.

Cancel access

By cancelling the session it will not automatically log out the consultant. The consultant should still click on Log out, but will then not be able to get back into the system as the access has been cancelled.

▼ Support Access History				
Date	Time	Reference Number	Access Expired	Access Cancelled
01 September 2015	11:50:43 AM	237167905c		<input checked="" type="checkbox"/>

Company

Company Details

- From the main navigation bar select **Company** and then **Company details**:

Company ▼

- Company details
- Manage pay periods
- Setup benefit funds
- Global payslip definitions
- Add new company
- Add new cycle

There are 5 sections on the **Company details** view.

- The **Company** section contains the following information:

Company

Company Number
999

Company Name
Demo Company

Company Registration Number
986706723

Tax Registration Number

Trade Classification

SDL Payment Reference Number (SARS)
 ☐ Some payments were made directly to the SETA


UIF Payment Reference Number (SARS)
 ☐ Some payments were made directly to UIF

UIF Registration Number (Dept of Labour)

Not eligible for Employment Tax Incentive
Not Selected

Standard Industry Classification

Special Economic Zone



- Company Number**
This is the company number entered when the company was added, and can be changed here. It is any number between 1 and 9999.
- Company Name**
Enter the company's registered name. This can be followed by the company's trading name.
- Company Registration Number**
If this is a registered company or cc, enter the registration number here.

Company

- **Tax Registration Number**
If the employer is registered for PAYE, then enter the PAYE number, otherwise enter the employer's Income Tax Number.
- **Trade Classification**
Select the applicable trade classification for the employer.
- **SDL Payment Reference Number (SARS)**
This is the SARS payment reference number for SDL and must only be completed if the employer is paying over SDL to SARS.
- **Some payments were made directly to SETA**
If you have made payments directly to a SETA, check this check box.
- **Some payments were made directly to UIF**
If you made payments directly to the UIF, check this check box.
- **UIF Payment Reference Number (SARS)**
This is the SARS payment reference number for UIF and must only be completed if the employer is paying over UIF to SARS.
- **UIF Registration Number (Debt of Labour)**
This is the UIF registration number as issued by the Department of Labour.
- **Not eligible for Employment Tax Incentive**
This dropdown menu allows you to select an option for not being eligible for ETI.
- **Standard Industry Classification**
Enter the SIC code. This code can easily be found by searching for it on the internet.
- **Special Economic Zone**
A Special Economic Zone is an economic development tool to promote national economic growth and export by using support measures in order to attract targeted foreign and domestic investments and technology.

The **Physical Address** section contains the following information:

Physical Address	
Unit Number	<input type="text"/>
Complex Name	<input type="text"/>
Street Number	<input type="text" value="99"/>
Street/Farm Name	<input type="text" value="This Street"/>
Suburb/District	<input type="text" value="That Suburb"/>
City/Town	<input type="text" value="Those Town"/>
Postal Code	<input type="text" value="0001"/>

Enter the employer's physical address.

The **Postal Address** section contains the following information:

Postal Address	
<input type="checkbox"/> Default from physical address	
Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
Address Line 3	<input type="text"/>
Postal Code	<input type="text"/>

Company

Enter the employer's postal address. If the postal address is the same as the physical address, check the **Default from physical address** check box.

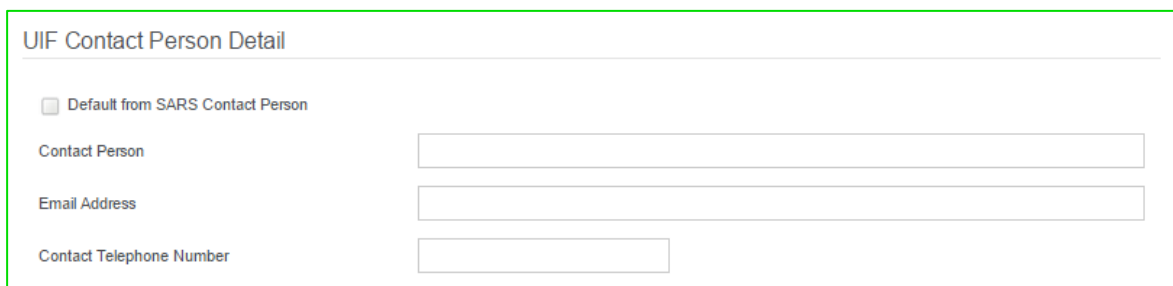
The **SARS Contact Person Detail** section contains the following information:



The screenshot shows a form titled "SARS Contact Person Detail". It contains three input fields: "Contact Person", "Email Address", and "Contact Telephone Number". Each field is represented by a text label followed by a rectangular input box.

- Contact person
- Email Address
- Contact Telephone Number

The **UIF Contact Person Detail** section contains the following information:



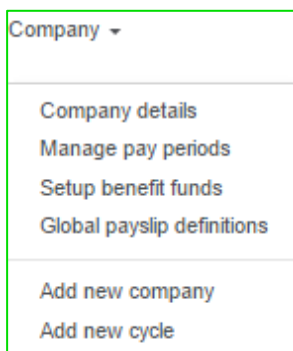
The screenshot shows a form titled "UIF Contact Person Detail". It includes a checkbox labeled "Default from SARS Contact Person" at the top. Below this are three input fields: "Contact Person", "Email Address", and "Contact Telephone Number", each with a text label and a corresponding input box.

- Contact person
- Email Address
- Contact Telephone Number

If the UIF contact person details are the same as the SARS contact person details, check the **Default from SARS Contact Person** check box.

Manage pay periods

From the main navigation bar select **Company** and then **Manage pay periods**.

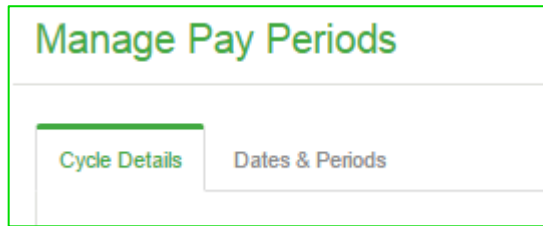


The screenshot shows a dropdown menu for "Company". The menu is open, displaying several options: "Company details", "Manage pay periods", "Setup benefit funds", "Global payslip definitions", "Add new company", and "Add new cycle". The "Manage pay periods" option is highlighted.

Company

Manage pay periods has 2 tabs:

- **Cycle Details**
- **Dates & Periods**



Cycle Details:

This tab contains the current company's information and cycle information. You can add new cycles here by clicking on the **Add New Cycle** button.

The screenshot shows the 'Manage Pay Periods' interface with the 'Cycle Details' tab active. It includes a table of cycles and a detailed view of the current cycle.

Cycle Name	Cycle	Period End Date	Tax Year Start Date	Tax Year End Date	Exclude from URF	Exclude from SDL	Pro Rate Annual Bonus	Close Cycle	Exclude from Tax Certificates
Weekly	Weekly	27 Mar 2015	28 Feb 2015	26 Feb 2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Period Details
This weekly pay cycle is in the 2015 tax year, which starts on 28 February 2015 and ends on 26 February 2016.
The current period end date is 27 March 2015.

Period in Tax Year	Period Start Date	Period End Date	Take On Period	Processing Month	Processed	Roll Back	Roll Over
1	28 Feb 2015	06 Mar 2015	✓	March	✓		
2	07 Mar 2015	13 Mar 2015	✓	March	✓		
3	14 Mar 2015	20 Mar 2015	✓	March	✓		
4	21 Mar 2015	27 Mar 2015	✓	March	✓	←	→
5	28 Mar 2015	03 Apr 2015	✓	April			
6	04 Apr 2015	10 Apr 2015	✓	April			
7	11 Apr 2015	17 Apr 2015	✓	April			
8	18 Apr 2015	24 Apr 2015	✓	April			
9	25 Apr 2015	01 May 2015	✓	May			
10	02 May 2015	08 May 2015	✓	May			

Undo Save

Close cycle

You can flag cycles that are no longer in use as closed. This will typically be used when a business or business unit closes.

The closed status is mainly used to include the cycle when generating tax certificates - we don't expect the cycle to have rolled a full tax year.

You are able to flag a cycle as closed if:



- All the employees in the cycle have been terminated and
- The user rolled out of the period in which the termination is effective.

If these conditions are not met, a report with the relevant information will display.

Company

Roll Over and Roll Back

Each period that you roll over is recorded here and marked when completed.

- **Rollover** 
You can select to roll over to the following period by clicking on this button. A backup is automatically made as part of the roll over process.
- **Roll back** 
You can select to do a roll back if you have to go back to a previous period. A roll back is different to restoring a backup. When you restore a backup of a previous month all data is restored to what it was at the time of the backup. When you roll back only your financial history (or anything affecting financials, such as tax status, age, etc.) is restored to what it was in the previous period. You are only allowed a maximum of two roll backs per company and you cannot roll back over tax years or to periods that you did not roll over from.

Dates & Periods:

This view allows you to edit period end dates of weekly and fortnightly companies and move periods to other payroll months.

Dates & Periods

Edit period end dates and period in month

This weekly pay cycle is in the 2016 tax year, which starts on 16 February 2016 and ends on 16 February 2016. The current period end date is 01 September 2015, which is period 1 of 5 of September 2015

March 2015

Period 1 of 5 (7 days)
This period ends on 24 Feb 2015

Period 2 of 5 (7 days)
This period ends on 3 Mar 2015

Period 3 of 5 (7 days)
This period ends on 10 Mar 2015

Period 4 of 5 (7 days)
This period ends on 17 Mar 2015

Period 5 of 5 (7 days)
This period ends on 24 Mar 2015

Period 6 of 5 (7 days)
This period ends on 31 Mar 2015

April 2015

Period 1 of 4 (7 days)
This period ends on 7 Apr 2015

Period 2 of 4 (7 days)
This period ends on 14 Apr 2015

Period 3 of 4 (7 days)
This period ends on 21 Apr 2015

Period 4 of 4 (7 days)
This period ends on 28 Apr 2015

May 2015

Period 1 of 4 (7 days)
This period ends on 5 May 2015

Period 2 of 4 (7 days)
This period ends on 12 May 2015

Period 3 of 4 (7 days)
This period ends on 19 May 2015

Period 4 of 4 (7 days)
This period ends on 26 May 2015

June 2015

Period 1 of 5 (7 days)
This period ends on 2 Jun 2015

Period 2 of 5 (7 days)
This period ends on 9 Jun 2015

Period 3 of 5 (7 days)
This period ends on 16 Jun 2015

Period 4 of 5 (7 days)
This period ends on 23 Jun 2015

Period 5 of 5 (7 days)
This period ends on 30 Jun 2015

July 2015

Period 1 of 4 (7 days)
This period ends on 7 Jul 2015

Period 2 of 4 (7 days)
This period ends on 14 Jul 2015

Period 3 of 4 (7 days)
This period ends on 21 Jul 2015

Period 4 of 4 (7 days)
This period ends on 28 Jul 2015

August 2015

Period 1 of 4 (7 days)
This period ends on 4 Aug 2015

Period 2 of 4 (7 days)
This period ends on 11 Aug 2015

Period 3 of 4 (7 days)
This period ends on 18 Aug 2015

Period 4 of 4 (7 days)
This period ends on 25 Aug 2015

September 2015

Period 1 of 5 (7 days)
This period ends on 2015-09-01

Period 2 of 5 (7 days)
This period ends on 2015-09-08

Period 3 of 5 (7 days)
This period ends on 2015-09-15

Period 4 of 5 (7 days)
This period ends on 2015-09-22

Period 5 of 5 (7 days)
This period ends on 2015-09-29

October 2015

Period 1 of 4 (7 days)
This period ends on 2015-10-06

Period 2 of 4 (7 days)
This period ends on 2015-10-13

Period 3 of 4 (7 days)
This period ends on 2015-10-20

Period 4 of 4 (7 days)
This period ends on 2015-10-27

November 2015

Period 1 of 4 (7 days)
This period ends on 2015-11-03

Period 2 of 4 (7 days)
This period ends on 2015-11-10

Period 3 of 4 (7 days)
This period ends on 2015-11-17

Period 4 of 4 (7 days)
This period ends on 2015-11-24

December 2015

Period 1 of 5 (7 days)
This period ends on 2015-12-01

Period 2 of 5 (7 days)
This period ends on 2015-12-08

Period 3 of 5 (7 days)
This period ends on 2015-12-15

Period 4 of 5 (7 days)
This period ends on 2015-12-22

Period 5 of 5 (7 days)
This period ends on 2015-12-29

January 2016

Period 1 of 4 (7 days)
This period ends on 2016-01-05

Period 2 of 4 (7 days)
This period ends on 2016-01-12

Period 3 of 4 (7 days)
This period ends on 2016-01-19

Period 4 of 4 (7 days)
This period ends on 2016-01-26

February 2016

Period 1 of 3 (7 days)
This period ends on 2016-02-02

Period 2 of 3 (7 days)
This period ends on 2016-02-09

Period 3 of 3 (7 days)
This period ends on 2016-02-16

March 2016

Period 1 of 5 (7 days)
This period ends on 23 Feb 2016

Period 2 of 5 (7 days)
This period ends on 3 Mar 2016

Period 3 of 5 (7 days)
This period ends on 10 Mar 2016

Period 4 of 5 (7 days)
This period ends on 17 Mar 2016

Period 5 of 5 (7 days)
This period ends on 24 Mar 2016

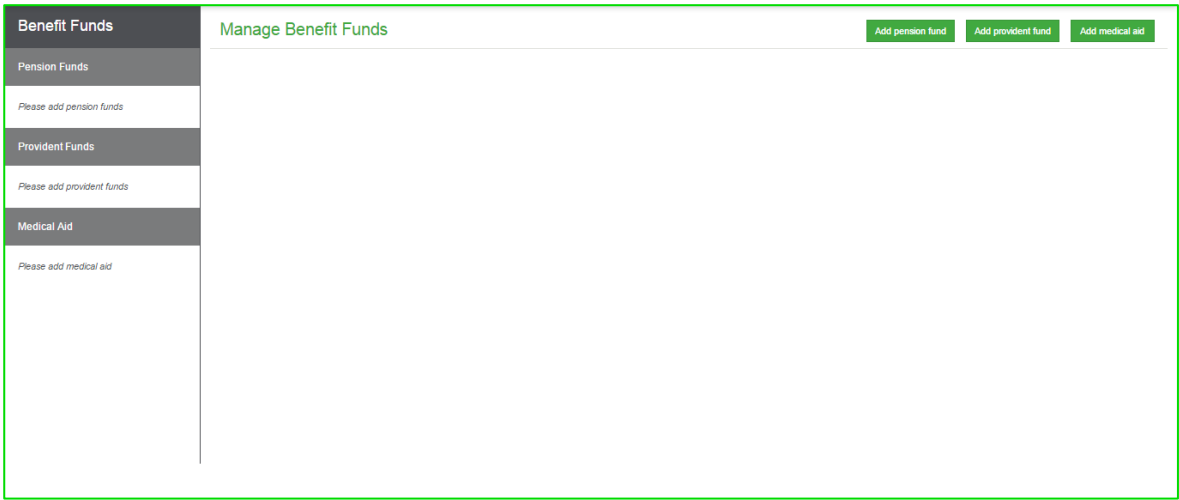
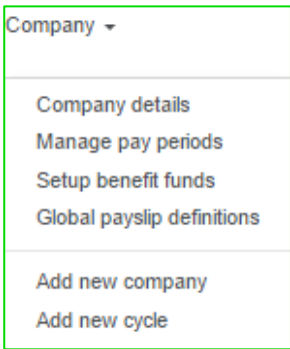
Payroll Getting Started Guide

21

Company

Setup benefit funds

- From the main navigation page click on **Company** and select **Setup benefit funds**.



From the **Manage Benefit Funds** view you will be able to add a pension, provident or medical aid fund.

Company

Pension and Provident Funds

To add a pension or provident fund, click on the **Add pension fund** or **Add provident fund** button.

Adding these funds will require the following information:

The image shows two side-by-side screenshots of the 'Manage Benefit Funds' form. The left screenshot is for 'Add pension fund' and the right is for 'Add provident fund'. Both forms have the following fields:

- Fund Name
- Clearance Number
- Description
- Contribution Setup
 - ☒ % Calculation ☐ Fixed Amount
- Calculation based on: Fixed Pensionable Earnings Amount
- Calculation will be based on: 0.00
- Contribution Type: Select Contribution Type
- Category Factor: 0.00 %
- Employee Contribution: 0.00 %
- Company Contribution: 0.00 %

- **Fund Name**
Give the fund you wish to add a name.
- **Clearance Number**
If a clearance number is provided this can be added but this field is not mandatory.
- **Description**
To describe this fund.
- **% Calculation or Fixed Amount**
You must select whether the calculation setup is based on a % that must be calculated or will it be a fixed amount.
- **Calculation based on**
This field requires that you select the type of calculation from a drop down menu.

The image shows a dropdown menu for the 'Calculation based on' field. The menu is open, showing three options: 'Specific Earnings', 'Fixed Pensionable Earnings Amount', and 'Percentage Of Specific Earnings'. The 'Specific Earnings' option is highlighted in green.

Company

- **Fixed Pensionable Earnings Amount**

This selection changes the Calculation will be based on field to an amount field, allowing you to type in the amount that the calculation will be based on.

Calculation based on	Fixed Pensionable Earnings Amount ▼	
Calculation will be based on	0.00	
Contribution Type	Select Contribution Type ▼ ?	
Category Factor	0.00	%
Employee Contribution	0.00	%
Company Contribution	0.00	%

- **Percentage Of Specific Earnings**

This selection changes the Calculation will be based on field to a % field, allowing you to type in the % value that the calculation will be based on and adding a selection drop down, containing all the income transactions, to select which incomes the % will be based on.

Calculation based on	Percentage Of Specific Earnings ▼	
Calculation will be based on	100.00	%
of		***
Contribution Type	Select Contribution Type ▼ ?	
Category Factor	0.00	%
Employee Contribution	0.00	%
Company Contribution	0.00	%

- **Specific Earnings**

This selection is the default selection and changes the Calculation will be based on field to a selection drop down, containing all the income transactions, to select which incomes the % will be based on.

Calculation based on	Specific Earnings ▼	
Calculation will be based on		***
Contribution Type	Select Contribution Type ▼ ?	
Category Factor	0.00	%
Employee Contribution	0.00	%
Company Contribution	0.00	%

Company

- **Contribution Type**

This field allows you to select which type of contribution this is. This information can be found on the fund's certificate.

- **Defined Contribution**
No category factor has to be stipulated if this option is selected.
- **Defined Benefit Fund**
Provide a Category Factor as stipulated on the fund certificate.

Contribution Type	Defined Benefit Fund	▼	?
Category Factor	0.00	%	
Employee Contribution	0.00	%	
Company Contribution	0.00	%	

- **Hybrid Fund**
Provide a Category Factor as stipulated on the fund certificate.

Contribution Type	Hybrid Fund	▼	?
Category Factor	0.00	%	
Employee Contribution	0.00	%	
Company Contribution	0.00	%	

- **Employee Contribution**

This field allows you to enter a value for the % the employee will contribute of the above calculated/given amount.

- **Employer Contribution**

This field allows you to enter a value for the % the employer will contribute of the above calculated/given amount.

- Ensure that you save once you have entered all the information needed.

Company

Medical Aid Fund

To add a medical aid fund, click on the **Add medical aid** button.

Manage Benefit Funds

Add medical aid

Fund Name	<input type="text"/>
Scheme Name	<input type="text"/>

- **Fund Name**
Give the fund you wish to add a name.
- **Scheme Name**
Provide the Scheme Name.



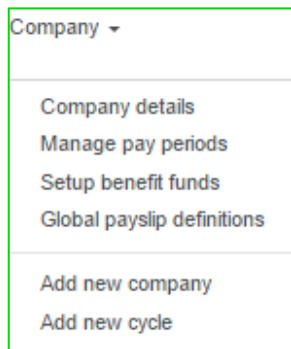
Important Information

Please note that adding a medical aid to the payslip of the employee will be done by adding the transactions on the payslip itself.

Company

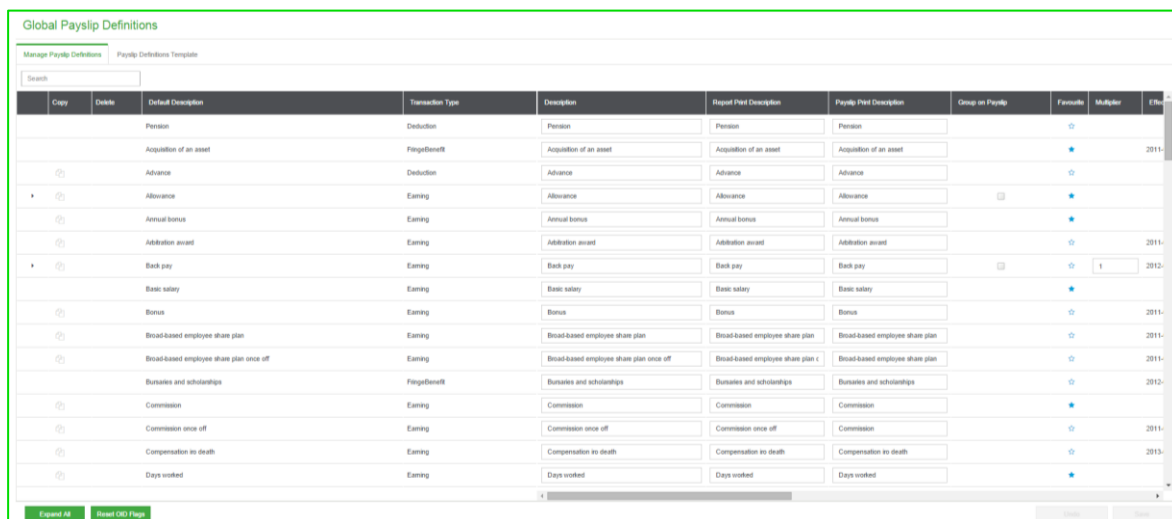
Global Payslip Definitions

- From the main navigation page click on **Company** and select **Global payslip definitions**.



Important Information

Please note that Global Payslip Definitions were designed to make global modifications that can affect all your companies. That is why adding payslip definitions and linking them to your template is a global function.



Global Payslip Definitions										
Manage Payslip Definitions				Payslip Definitions Template						
Search										
Copy	Delete	Default Description	Transaction Type	Description	Report Period Description	Payslip Period Description	Group on Payslip	Formula	Multiplier	Effective Date
		Pension	Deduction	Pension	Pension	Pension				
		Acquisition of an asset	FringeBenefit	Acquisition of an asset	Acquisition of an asset	Acquisition of an asset				2011-
		Advance	Deduction	Advance	Advance	Advance				
		Allowance	Earning	Allowance	Allowance	Allowance				
		Annual bonus	Earning	Annual bonus	Annual bonus	Annual bonus				
		Addition award	Earning	Addition award	Addition award	Addition award				2011-
		Back pay	Earning	Back pay	Back pay	Back pay			1	2012-
		Basic salary	Earning	Basic salary	Basic salary	Basic salary				
		Bonus	Earning	Bonus	Bonus	Bonus				2011-
		Broad-based employee share plan	Earning	Broad-based employee share plan	Broad-based employee share plan	Broad-based employee share plan				2011-
		Broad-based employee share plan once off	Earning	Broad-based employee share plan once off	Broad-based employee share plan once off	Broad-based employee share plan once off				2011-
		Bursaries and scholarships	FringeBenefit	Bursaries and scholarships	Bursaries and scholarships	Bursaries and scholarships				2012-
		Commission	Earning	Commission	Commission	Commission				
		Commission once off	Earning	Commission once off	Commission once off	Commission once off				2011-
		Compensation in death	Earning	Compensation in death	Compensation in death	Compensation in death				2013-
		Days worked	Earning	Days worked	Days worked	Days worked				

Global Payslip Definitions has 2 tabs:


- Manage Payslip Definitions** – You can copy and delete transaction definitions and edit their descriptions displaying in the system and on reports and printed payslips. Changes can also be made to the default OID flags and changes are allowed to the multipliers of certain definitions.
- Payslip Definition Templates** - Templates are used to select the definitions that are used in companies. You can add or delete any definition from an existing template or create your own template.

Manage Payslip Definitions

Copy	Delete	Default Description	Transaction Type	Description	Report Print Description	Payslip Print Description	Group on Payslip	Formula	Multiplier	Effective Date
		Pension	Deduction	Pension	Pension	Pension				
		Acquisition of an asset	FringeBenefit	Acquisition of an asset	Acquisition of an asset	Acquisition of an asset				2011-
		Advance	Deduction	Advance	Advance	Advance				
		Allowance	Earning	Allowance	Allowance	Allowance				
		Annual bonus	Earning	Annual bonus	Annual bonus	Annual bonus				
		Addition award	Earning	Addition award	Addition award	Addition award				2011-
		Back pay	Earning	Back pay	Back pay	Back pay			1	2012-
		Basic salary	Earning	Basic salary	Basic salary	Basic salary				
		Bonus	Earning	Bonus	Bonus	Bonus				2011-
		Broad-based employee share plan	Earning	Broad-based employee share plan	Broad-based employee share plan	Broad-based employee share plan				2011-
		Broad-based employee share plan once off	Earning	Broad-based employee share plan once off	Broad-based employee share plan c	Broad-based employee share plan				2011-
		Bursaries and scholarships	FringeBenefit	Bursaries and scholarships	Bursaries and scholarships	Bursaries and scholarships				2012-
		Commission	Earning	Commission	Commission	Commission				
		Commission once off	Earning	Commission once off	Commission once off	Commission				2011-
		Compensation in death	Earning	Compensation in death	Compensation in death	Compensation in death				2013-
		Days worked	Earning	Days worked	Days worked	Days worked				



Important Information

Please note that you can only copy lines with this  icon. All the tax rules for that specific type is copied to the new line.

You can only delete lines with this  icon and only definitions with no values on them can be deleted. If a definition is used in any of the companies, you will not be able to delete it.

You can edit the Description, Report Print Description and Payslip Print Description fields:

Description	Report Print Description	Payslip Print Description
Pension	Pension	Pension
Acquisition of an asset	Acquisition of an asset	Acquisition of an asset
Advance	Advance	Advance
Allowance	Allowance	Allowance

Fields, Headings and Buttons on the grid:

- **Default Description**
This is the original definition description and cannot be edited
- **Transaction Type**
Indicates whether it is earnings, deductions, company contributions or fringe benefits.
- **Description**
This is the description as it will display on any view (e.g. Payslip, Year to Date, etc.). You can edit this description.
- **Report Print Description**
This is the description as it will display on any report. You can edit this description.
- **Payslip Print Description**
This is the description as it will display on all payslips. You can edit this description.
- **Group on Payslip**
This option will allow you to total the group of definitions as one value on the printed payslips. The description that will print will be the description of the first line in the group. In the example below

Company

you will see all the definitions for the group **Allowance**, but what will print on the payslip is a total for **Allowance**, **Shift allowance**, **Tool allowance**, **Computer allowance**, **Phone allowance** and **Other allowance**.

▼	Allowance	Earning	Allowance	Allowance	Allowance	□
	Allowance	Earning	Shift allowance	Shift allowance	Shift allowance	
	Allowance	Earning	Tool allowance	Tool allowance	Tool allowance	
	Allowance	Earning	Computer allowance	Computer allowance	Computer allowance	
	Allowance	Earning	Phone allowance	Phone allowance	Phone allowance	
	Allowance	Earning	Other allowance	Other allowance	Other allowance	


- **Favourite**

When you flag a definition as a favourite , it will always be listed at the top of the list in alphabetical order on the **Manage Payslip Definitions** view.


- **Multiplier**

On definitions that use a multiplier, for example overtime and reimbursed kilometres, you can edit the multiplier.

- **Copy**

Click on the copy icon  to copy transaction definitions. Only definitions with this icon can be copied.

- **Delete**

You can delete any definition you copied as long as the delete icon  is visible. If any values have been processed against this definition in any company, you will not be able to delete it.

- **Effective From**

The effective from date is to indicate from which year the applicable definition has been valid. For example the Bursaries and scholarships fringe benefit is only effective since March 2012. With Sage Business Cloud Payroll you can add a company over different tax years and for IRP5 purposes it is important that the correct definitions show in the correct tax year.

- **Effective To**

The effective to date is to indicate up to which year the applicable definition is valid. For example the IRP5 code for "Free or cheap services" changed in March 2012, so the old definition is effective to February 2012. With Sage Business Cloud Payroll you can add a company over different tax years and for IRP5 purposes it is important that the correct definitions show in the correct tax year.

- **IRP5 Code**

This is the IRP5 code applicable to the specific definition, for IRP5 purposes.

- **IRP5 Code Description**

This is the IRP5 code description applicable to the specific definition, for IRP5 purposes.

- **Taxability**

This is the taxability of the specific earning whether it is normal (monthly), periodic or not taxable.

- **Taxable %**

This is the percentage of the value processed on the definition that Sage Business Cloud Payroll will tax.

- **Directive Mandatory**

This is to indicate whether a directive is mandatory for the applicable definition.

- **OID Included**

This is the only other editable field. The OID flags default, but you can change the flag to include or exclude the definition in the OID calculation for the OID report.

- **UIF Included**

This is to indicate which definitions are used to calculate UIF Remuneration.

- **UIF Use Tax %**

This is to indicate whether the taxable % value must be used instead of the full amount when Sage Business Cloud Payroll calculates UIF Remuneration for this specific definition.

- **SDL Included**

This is to indicate which definitions are used to calculate SDL Remuneration.


- **SDL Use Tax %**

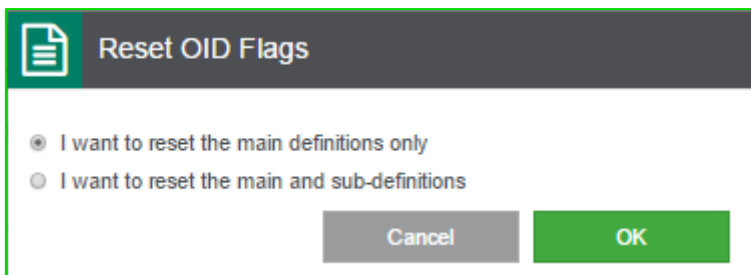
This is to indicate whether the taxable % value must be used instead of the full amount when Sage Business Cloud Payroll calculates SDL Remuneration for this specific definition.

- **RFI Included**

This is to indicate which definitions are used to calculate RFI Remuneration.

Company

- **RFI Tax %**
This is to indicate whether the taxable % value must be used instead of the full amount when Sage Business Cloud Payroll calculates RFI Remuneration for this specific definition.
- **ETI Included**
This is to indicate whether the transaction is included in the ETI calculation or not.
- **ETI Use Taxable Value**
If this definition is checked, then the taxable portion of the value processed on this definition will be included.
- **Expand All/Collapse All button**
You can either expand or collapse all groups with **Expand All** or **Collapse All**. You can also expand or collapse a specific group by clicking on the  next to the group.
- **Reset OID flags**
You can reset all the OID flags to their original state with the option **Reset OID Flags**. It will prompt you to select whether you want to reset main definitions only or main and sub definitions.



The dialog box titled "Reset OID Flags" has a document icon on the left. It contains two radio button options: "I want to reset the main definitions only" (selected) and "I want to reset the main and sub-definitions". At the bottom right are "Cancel" and "OK" buttons.



Important Information

Please note that you can sort or filter on some of the headings on the Manage Payslip Definitions view. When you hover your mouse over the heading you will see your cursor turn into a hand allowing you to click. If you click a heading you will be able to filter on this heading in ascending order and clicking again will filter in descending order:

Default Description
Acquisition of an asset
Additional tax
Advance
Allowance
Annual bonus
Arbitration award
Back pay
Basic salary
Bonus
Broad-based employee share plan

Payslip Definition Templates

[illegible]

Templates are used to select the specific definitions you want to use in a company. In Sage Business Cloud Payroll you only do the setup once, and template the definitions to each company. Once you have added and edited your definitions on the **Manage Payslip Definition** view you can add them to your templates.

You can edit existing templates to add or remove definitions from the template, or you can add a new template.

There are two existing templates:

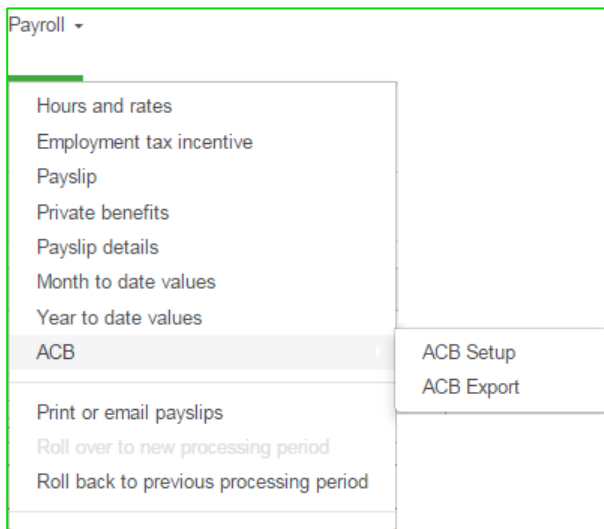
- **Salaries**
This template was designed with a selection of basic definitions specific to the monthly cycle. It can, however, be changed to include the weekly and biweekly cycles. If you add a new company with a monthly cycle, it will use the **Salaries** template by default and will only change if you create a new template that you want as the default and flag it as such.
- **Wages**
This template was designed with a selection of basic definitions specific to the weekly and fortnightly cycle. It can, however, be changed to include the monthly cycle. If you add a new company with a weekly or fortnightly cycle, it will use the **Wages** template by default and will only change if you create a new template that you want as the default and flag it as such.



Important Information

Please note that both the default templates can be modified by either adding new definitions or deleting exiting definitions.

Payroll



The Payroll drop down view is separated into 2 sections:

- The first section contains all the payslip details and information.
- The second section allows you to do a roll over and roll back as well as print or email payslips.

Hours and rates

When adding an employee you can add the employee's monthly salary, rate per hour or rate per day on the payslip view when entering the basic salary or you can access the **Hours and Rates** view and complete the fields there.

Adding rates from the Hours and Rates view:

From the main navigation bar select **Payroll** and then **Hours and rates**. The following screen is displayed:

 A screenshot of the 'Hours and Rates' view for an employee named '009 Biff Demo'. The interface has a top navigation bar with tabs: 'Employee Details', 'Hours and Rates' (active), 'ETI', 'Payslip', 'Private Benefits', 'Payslip Details', and 'Year To Date'. There are two buttons in the top right: 'End Employment' (green) and 'Delete Employee' (grey). The main content area is divided into two sections: 'Hours' and 'Rates'. The 'Hours' section has four input fields: 'Working Hours per Day' (8.00), 'Working Days per Week' (5.00), 'Average Working Hours per Month' (176.00), and 'Average Working Days per Month' (22.00). The 'Rates' section has four input fields: 'Annual Salary' (\$40,000.00), 'Fixed Salary' (45,000.00), 'Rate per Day' (2,045.4545), and 'Rate per Hour' (255.6818). At the bottom, there is a checkbox labeled 'This employee must not be paid unless hours or days worked are advised'.

Payroll

The employee's hours and rates must be entered on this view.

Field	Description
Working hours per day	Enter the number of hours the employee works per day. The hours will default to 8 hours a day, but can be modified. If the employee does not work the same amount of hours every day, enter the average number of hours per day the employee works.
Working days per week	Enter the number of days the employee works per week. The days will default to 5 days a week, but can be modified.
Average working hours per month	This value will be used to calculate the rate per hour. The value will default to 176, but can be modified.
Average working days per month	This value will be used to calculate the rate per day. The value will default to 22, but can be modified. Working days per period are usually 20, 21, 22 or the average of 21,67.

Field	Description
Annual salary	Enter any one of these values according to the employee's employment contract.
Fixed salary	
Rate per day	
Rate per hour	
This employee must not be paid unless hours or days worked are advised	Select this option if the employee's salary must not be paid by default. The system will require input of hours or days before a salary is calculated. Use this option for employees who, for example, have to submit a time sheet of hours worked.

If you want to enter the number of days or hours worked every period, and do not want Sage Business Cloud Payroll to default the employee's salary after every roll over, flag the **This employee must not be paid unless hours or days worked are advised** check box.

Payroll

Adding rates from the Payslip's View

From the main navigation bar select **Payroll** and then **Payslip**. (Click on the **Payslip** tab.)

Earnings	Deductions	Company Contributions
Basic salary 45,000.00	Tax 9,845.51	Unemployment insurance fund 148.72
	Unemployment insurance fund 148.72	Skills development levy 416.25
	Pension 22,500.00	Pension 22,500.00
		Total 23,064.97
		Fringe Benefits
Total 45,000.00	Total 32,494.23	Total 0.00
Nett Pay		12,505.77

The basic salary line will always default on the payslip screen of monthly cycles. If you click on it the below screen will display. You can enter the employee's rates here, or advise any once off amounts to be paid.

You are making changes to Basic salary

Hours and Rates

Hours

Working Hours per Day 8.00

Working Days per Week 5.00

Average Working Hours per Month 176.00

Average Working Days per Month 22.00

Rates

Annual Salary 540,000.00

Fixed Salary 45,000.00

Rate per Day 2,045.45

Rate per Hour 255.6818

Adjustment to Basic Salary

Adjustment to Basic Salary

☒ I do not want to make an adjustment for this month

☐ I want to pay 0.00 Days

☐ I want to adjust the Basic salary to R 0.00 for this month

☐ I do not want to pay this Basic salary this month

If the basic is not to be paid this month, you can check the **I do not want to pay this Basic salary this month** check box.

If you need to pro-rata the salary because the employee didn't work the full period, check the **I want to pay** check box and enter the number of days.

Payroll

If the user wants to advise a salary amount that must be paid out (not the normal salary for the month and not based on hours worked), check the **I want to adjust the Basic salary to** check box and enter the amount.

If the employee is not receiving a salary this month, check the **I do not want to pay this Basic salary this month** check box.

Employment Tax Incentive

The Employment Tax Incentive legislation will encourage employers to hire young people by reducing the amount of PAYE you have to pay to SARS, thereby, reducing the cost of employment to the employer while leaving the employee's earnings unaffected. The effective date of the legislation is 1 January 2014.

Payslip

From the main navigation bar select **Payroll** and then **Payslip**.

009

Biff Demo

End Employment

Delete Employee

Employee Details

Hours and Rates

ETI

Payslip

Private Benefits

Payslip Details

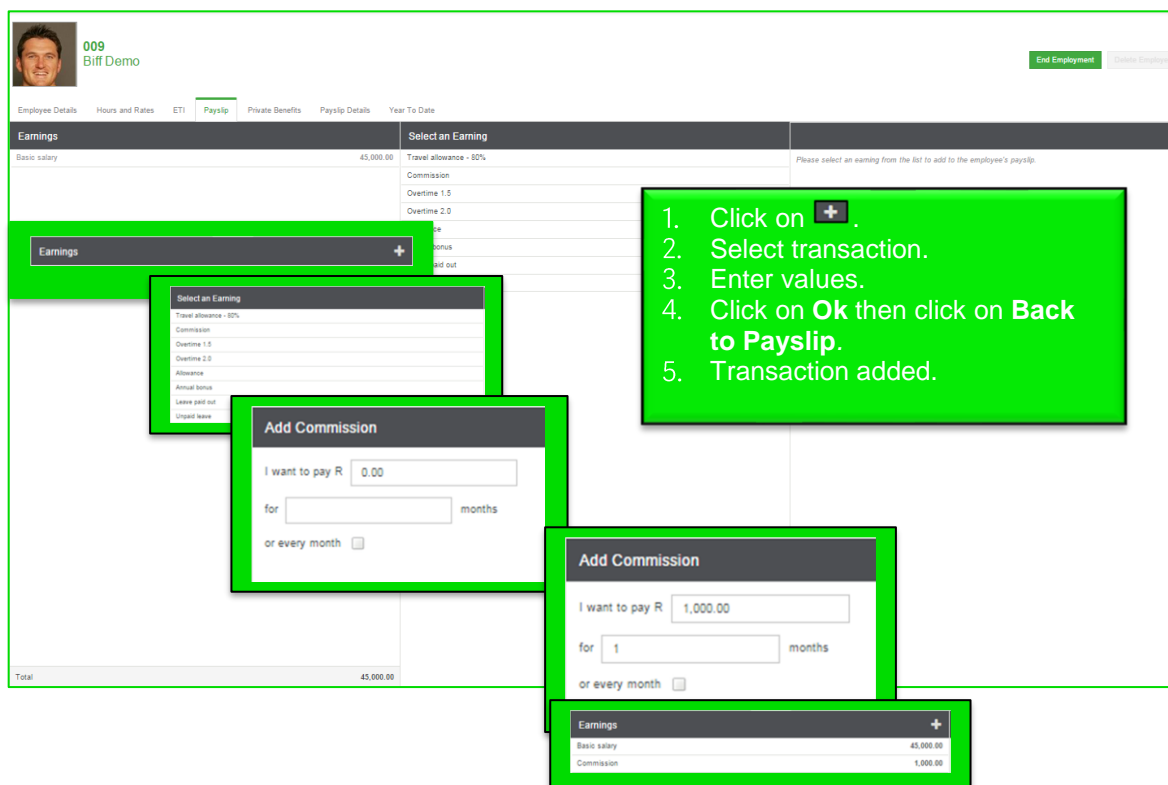
Year To Date

Earnings		Deductions		Company Contributions	
Basic salary	45,000.00	Tax	9,845.51	Unemployment insurance fund	148.72
		Unemployment insurance fund	148.72	Skills development levy	416.25
		Pension	22,500.00	Pension	22,500.00
				</	

The payslip has sections for earnings, deductions, company contributions and fringe benefits.

Payroll

In order to add a new transaction to the payslip, click on **+** in the applicable header. Select the transaction you want to add and capture the information required on the side menu.



1. Click on **+**.
2. Select transaction.
3. Enter values.
4. Click on **Ok** then click on **Back to Payslip**.
5. Transaction added.

Intelligent calculations on the payslip

- Annual bonus – In Sage Business Cloud Payroll we designed the annual bonus calculation to be an intelligent calculation making adding, editing and deleting the annual bonus with or without provision and for a current or future month, as easy and simple as possible. It all starts with the way the annual bonus transaction popup works.
- Select **+** from the earnings heading **Earnings** **+**
- Then select **Annual Bonus**.

Select an Earning
Travel allowance - 80%
Overtime 1.5
Overtime 2.0
Allowance
Annual bonus
Leave paid out
Unpaid leave

Payroll

Once you have selected the annual bonus definition you can either choose a manual bonus value or a 13th cheque.

Add Annual bonus

I want to pay a manual bonus ☐ or the system must calculate a 13th cheque ☐

Once you select **the system must calculate a 13th cheque**, you will be able to select any date after the current processing month that you are in on Sage Business Cloud Payroll in which you want to pay out your 13th cheque.

Add Annual bonus

I want to pay a manual bonus ☐ or the system must calculate a 13th cheque ☒

The 13th cheque must be paid in

You can select to make provision for tax on this annual bonus

Provision for tax on the annual bonus must be made until

A pro rata bonus will be paid if the employee is employed for less than 12 months in the bonus month.
Change this setting on the Manage Companies and Cycles view.

March
April
May
June
July
August
September
October

the bonus is paid
the end of the tax year

You also have the option to select the bonus provision period. You can either provide for the annual bonus until the bonus is paid or you can select to provide until the end of the tax year.

You can, however, change this option from month to month up until the month the bonus is paid and Sage Business Cloud Payroll will recalculate the provision according to the options you select.

A pro rata bonus will be paid if the employee is employed for less than 12 months in the bonus month.
Change this setting on the Manage Companies and Cycles view.

It is imperative that you take note of the bottom message. If the company is not flagged to pro rata a 13th cheque when paid to an employee, the employee will receive the full value. Alternatively you can select a manual bonus value.

OR

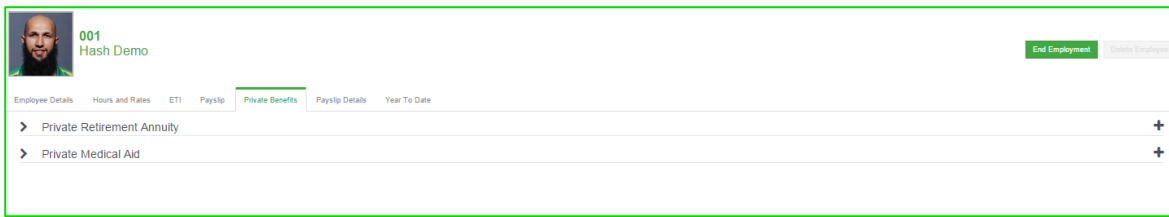
I do not want to make provision for tax on this bonus anymore ☐

A full bonus will be paid, even if the employee is employed for less than 12 months in the bonus month.
Change this setting on the Manage Companies and Cycles view.

Payroll

Private Benefits

From the main navigation bar select **Payroll** and then **Private Benefits**.



001 Hash Demo

End Employment Details Employee

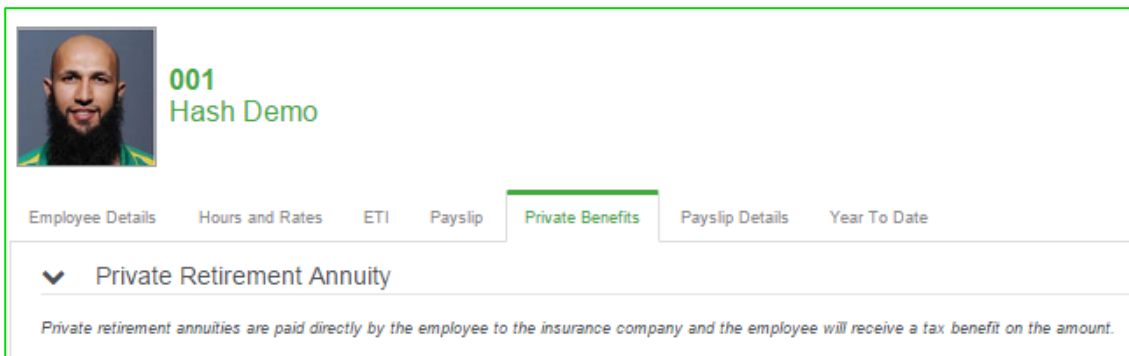
Employee Details Hours and Rates ETI Payslip **Private Benefits** Payslip Details Year To Date

> Private Retirement Annuity +

> Private Medical Aid +

The **Private Benefits** section has two expandable views:

- **Private Retirement Annuity**



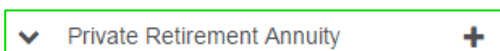
001 Hash Demo

Employee Details Hours and Rates ETI Payslip **Private Benefits** Payslip Details Year To Date

▼ Private Retirement Annuity

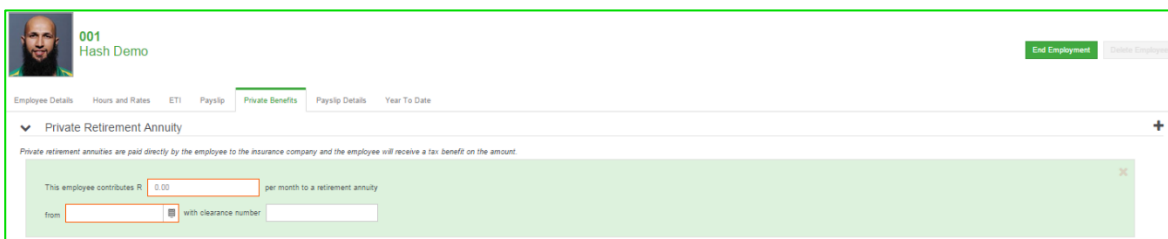
Private retirement annuities are paid directly by the employee to the insurance company and the employee will receive a tax benefit on the amount.

A **Private Retirement Annuity** can be added by clicking on the add option next to it.



▼ Private Retirement Annuity +

This will expand the view once more.



001 Hash Demo

End Employment Details Employee

Employee Details Hours and Rates ETI Payslip **Private Benefits** Payslip Details Year To Date

▼ Private Retirement Annuity +

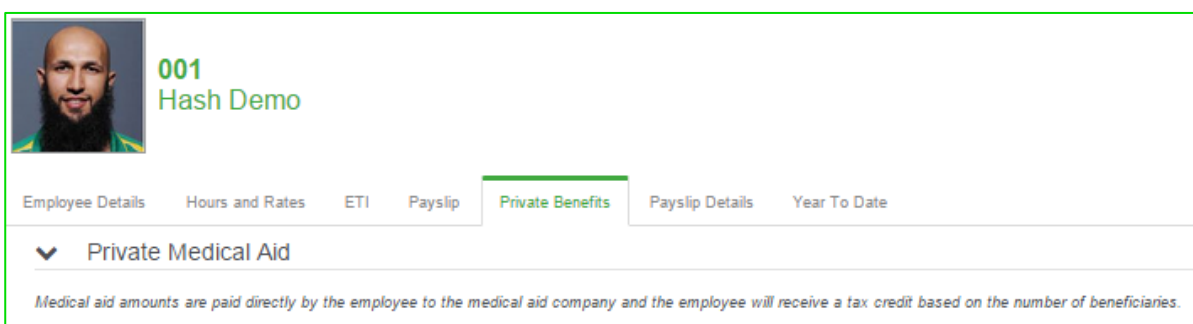
Private retirement annuities are paid directly by the employee to the insurance company and the employee will receive a tax benefit on the amount.

This employee contributes R per month to a retirement annuity

from with clearance number

Enter the amount that the employee is contributing and the date from which the contributions will start. You can also add a clearance number if you have one.

- **Private Medical Aid**



001 Hash Demo

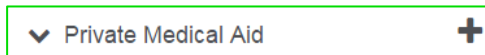
Employee Details Hours and Rates ETI Payslip **Private Benefits** Payslip Details Year To Date

▼ Private Medical Aid

Medical aid amounts are paid directly by the employee to the medical aid company and the employee will receive a tax credit based on the number of beneficiaries.

Payroll

A **Private Medical Aid** can be added by clicking on the add option next to it.



This will expand the view once more.

A screenshot of the expanded 'Private Medical Aid' form. It includes a header with a minus icon and the title 'Private Medical Aid'. Below the header is a note: 'Medical aid amounts are paid directly by the employee to the medical aid company and the employee will receive a tax credit based on the number of beneficiaries.' The main form area has a text input field for 'I want to give this employee the benefit of R' with the value '0.00', followed by 'per month from' and a date picker set to '2013-10-10'. Below this is a section titled 'Medical Aid Beneficiaries' with a plus icon. It contains a table with columns: Delete, Name, From, and To. The table has one row with 'Hash Demo' in the Name column and '2013-10-10' in the From column.

Enter the amount that the employee is contributing and the date from which the contributions will start. You can also add all the medical aid beneficiaries.

Payslip Details

From the main navigation bar select **Payroll** and then **Payslip Details**.


A screenshot of the 'Payslip Details' view for employee 001 Hash Demo. The view shows a table with columns: Description, Input Units, Input Amount, and Final Amount. The table is divided into sections: Earnings, Deductions, Company Contributions, System, and Tax Deductible Deduction. The Earnings section includes Basic salary (5,500.00). The Deductions section includes Unemployment Insurance Fund (55.00), Pension (450.00), and Skills development levy (55.88). The Company Contributions section includes Unemployment Insurance Fund (55.00) and Pension (450.00). The System section includes SDL remuneration (5,587.50), UIF remuneration (5,500.00), Gross taxable remuneration (5,500.00), Balance of remuneration excl periods (ytd) (5,587.50), Balance of remuneration incl periods (ytd) (5,587.50), Ratable remuneration (5,500.00), Retirement funding income (5,500.00), Half pay (4,895.00), Unused personal leave earnings (500.00), and ETI remuneration (5,500.00). The Tax Deductible Deduction section includes Pension tax deductible deduction (412.50).

The **Payslip Details** view will display all the transactions on the employee's payslip in a summative format as well as the amounts that the system will use to make statutory calculations. This view can come in very useful when doing manual calculations.

Payroll

Month To Date

From the main navigation bar select **Payroll** and then **Month To Date** values.



001
Zane Demo

IRP5 Validations

End Employment

Delete Employee

Employee DetailsHours and RatesETIPayslipPrivate BenefitsPayslip DetailsMonth To DateYear To DateLeaveLeave Transactions


Month to Date figures for March

Description	Period 1 of 4 Period end date 06 Mar 2015	Period 2 of 4 Period end date 13 Mar 2015	Period 3 of 4 Period end date 20 Mar 2015	Period 4 of 4 Period end date 27 Mar 2015	Total
Earning					
Wage	2,000.00	0.00	0.00	0.00	2,000.00
TOTAL	2,000.00	0.00	0.00	0.00	2,000.00
Deduction					
Tax	104.36	0.00	0.00	0.00	104.36
Unemployment insurance fund	20.00	0.00	0.00	0.00	20.00
TOTAL	124.36	0.00	0.00	0.00	124.36
Company Contribution					
Unemployment insurance fund	20.00	0.00	0.00	0.00	20.00
Skills development levy	20.00	0.00	0.00	0.00	20.00
TOTAL	40.00	0.00	0.00	0.00	40.00
Fringe Benefit					
TOTAL	0.00	0.00	0.00	0.00	0.00
Private Benefit					
TOTAL	0.00	0.00	0.00	0.00	0.00
Provision					

The **Month To Date** view provides you with a table containing all the figures loaded for the employee for the month, up to the current date.

Year To Date

From the main navigation bar select **Payroll** and then **Year To Date** values.



001
Hash Demo

End Employment

Delete Employee

Employee DetailsHours and RatesETIPayslipPrivate BenefitsPayslip DetailsYear To Date

Year to Date figures up to March

Description	March	April	May	June	July	August	September	October	November	December	January	February	Total
Earning													
Basic salary	5,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5,500.00
TOTAL	5,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5,500.00
Deduction													
Unemployment insurance fund	55.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	55.00
Pension	450.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	450.00
TOTAL	505.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	505.00
Company Contribution													
Unemployment insurance fund	55.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	55.00
Skills development levy	50.88	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	50.88
Pension	450.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	450.00
TOTAL	555.88	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	555.88
Fringe Benefit													
TOTAL	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Private Benefit													
TOTAL	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Provision													
TOTAL	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Totals													
Nett Pay	4,995.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4,995.00
Total Cost	6,055.88	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6,055.88

The **Year To Date** view provides you with a table containing all the figures loaded for the employee for the year, up to the current date.

Payroll

ACB

From the main navigation bar select **Payroll**, **ACB** and then **ACB Setup**.

ACB Setup

ACB Layout Type

Not Selected

When setting up the ACB layout you can select from the following options:

Not Selected

Not Selected

ABSA Business Integrator

FNB Online Enterprise

Netbank

Standard Bank Business Online

After entering the details you can save and export the information. By clicking on the **Export** button you will be prompted to give more information specific to the type of bank selected previously.

ACB Export

Standard Bank Business Online ACB Export for Demo Company - Weekly

ACB Layout Type

Standard Bank Business Online

Export Settings

File Name

STDBANK.txt

Payment Action Date

Statement Reference

Live Run

☐

Please note that the export is only for currently selected company and cycle

Payroll

Once the information has been entered click on **Process**.

ACB Export

ACB Payment Run Details

Export to PDF

ACB transactions for Demo Company - Weekly, using Standard Bank Business Online on 2015-10-06

Sequence Number	Employee	Account Type	Branch Code	Account Number	Amount
Total Count: 0					0.00

Download Process

The **Export to PDF** button will display the file in PDF format. The **Download** button will download the file to your **Downloads** folder and can be accessed there to import into the banking website.

Roll Over and Roll Back

The roll over or roll back functions can be performed from two different options. From the main navigation bar, click on **Payroll** and then select either **Roll over to new processing period** or **Roll back to previous processing period**. From the black top navigation bar select the **Current Period**: option for a drop down menu and select either **Roll Over** or **Roll Back**.

Payroll ▾

- Hours and rates
- Employment tax incentive
- Payslip
- Private benefits
- Payslip details
- Month to date values
- Year to date values
- ACB ▶
- Previous Tax Year

- Print or email payslips
- Roll over to new processing period
- Roll back to previous processing period

Current Period: 27 Mar 2015 | Period 4 of 4 ▾

- ➔ Roll Over
- ➔ Roll Back
- Manage Pay Periods
- Previous Tax Year

Payroll

Roll Over

Roll Over to the New Period

You selected to roll Mid Year Submission - Weekly over to a new period.

Current Period	27 March
New Period	03 April

Your **27 March** payroll was processed free of charge.

Cancel

Finish

Roll Back

Roll back to previous period

Rollback Confirmation

Period Rollback

Rolling back to the previous period will delete any processing you have already done in the current period. You will have to roll over again and recapture you processing.

All financial values will be rolled back, including all fields affecting financial values, such as:

- The employee start date
- The end employment date
- How the employee is taxed
- SDL and UIF statuses
- Hours and rates information
- Benefit fund details
- Leave transactions and balances

☐ Continue with rollback

Roll back to previous period

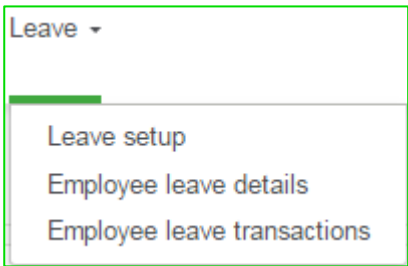
Rollback Confirmation

Period Rollback

You selected to roll Mid Year Submission - Monthly to previous period.

Current Period	September
Previous Period	August

Leave



Leave Setup

In order to activate the Leave Module, select **Leave** from the main navigation bar and select **Leave setup**.

Leave Setup

☒ Use the leave module in this company (no additional cost)

Annual Leave

DescriptionAnnual Leave

Leave Rule Description	Cycle Start Date	Cycle Length	Cycle Recurs	Entitlement Value	Leave Accrual	Balance at the End of the Cycle	Leave Taken Order	Allow transaction to
Annual Leave	The employees' leave start date	1 year	✓	15.0000	Period entitlement is accrued at the start of each month	The balance will be transferred to another rule	2	Allow without a warn
Annual Leave 6 months remaining	Start date of another rule	6 months	✓		Cycle entitlement is accrued at the start of the leave cycle	The balance will be transferred to another rule	1	Allow without a warn
Annual Leave excess	This cycle has no start value						0	Allow without a warn

Sick Leave

DescriptionSick Leave

Leave Rule Description	Cycle Start Date	Cycle Length	Cycle Recurs	Entitlement Value	Leave Accrual	Balance at the End of the Cycle	Leave Taken Order	Allow transa
Sick Leave first 6 months	The employees' leave start date	6 months		6.0000	Period entitlement is accrued at the start of each month	The balance will be transferred to another rule	3	Allow withou
Sick Leave remaining 30 months	Start date of another rule plus 6 months	30 months		24.0000	Cycle entitlement is accrued at the start of the leave cycle	The balance will be cleared	2	Allow withou
Sick Leave 3 year cycle	Start date of another rule plus 30 months	3 years	✓	30.0000	Cycle entitlement is accrued at the start of the leave cycle	The balance will be cleared	1	Allow withou

UndoSave

In the right top corner check the **Use the leave module in this company (no additional cost)** check box.

Leave Setup

☒ Use the leave module in this company (no additional cost)

The following screen will be displayed if leave is activated at a later stage:

!

Activate Leave Module

By activating this module, you are activating leave for your employees.

Leave accrual will start in the period the module is activated. We advise you to update the employees' leave balances in the period that you activate the leave module.

Please update the default entitlement values in the grid and set the rules that must be applied when leave transactions are added.

Cancel

OK

Leave

If you click on the **OK** button the leave module will be activated. Complete the grids as indicated below with the leave entitlement values as well as leave processing requirements.

Leave Setup

Use the leave module in this company (no additional cost)

Annual Leave

Leave Rule Description	Cycle Start Date	Cycle Length	Cycle Recurs	Entitlement Value	Leave Amount	Balance at the End of the Cycle	Leave Taken Order	Allow Transfers to another leave balance?	Exempt by leave policy type?	Auto request?	After leave policy type?	Reference number request?
Annual Leave	The employees' leave start date	1 year	✓	15.0000	Period entitlement is accrued at the start of each month	The balance will be transferred to another rule	2	Allow without a waiting		0		0
Annual Leave 6 months remaining	Start date of another rule	6 months	✓		Cycle entitlement is accrued at the start of the leave cycle	The balance will be transferred to another rule	1	Allow without a waiting		0		0
Annual Leave excess	This cycle has no start value						0	Allow without a waiting		0		0

Sick Leave

Leave Rule Description	Cycle Start Date	Cycle Length	Cycle Recurs	Entitlement Value	Leave Amount	Balance at the End of the Cycle	Leave Taken Order	Allow Transfers to another leave balance?	Exempt by leave policy type?	Auto request?	After leave policy type?	Reference number request?
Sick Leave 1st 10 months	The employees' leave start date	10 months		0.0000	Period entitlement is accrued at the start of each month	The balance will be transferred to another rule	3	Allow without a waiting		0		0
Sick Leave 10 months remaining	Start date of another rule plus 10 months	10 months		0.0000	Cycle entitlement is accrued at the start of the leave cycle	The balance will be transferred to another rule	2	Allow without a waiting		0		0
Sick Leave 2 year cycle	Start date of another rule plus 24 months	2 years	✓	0.0000	Cycle entitlement is accrued at the start of the leave cycle	The balance will be transferred to another rule	1	Allow without a waiting		0		0

Family Leave

Leave Rule Description	Cycle Start Date	Cycle Length	Cycle Recurs	Entitlement Value	Leave Amount	Balance at the End of the Cycle	Leave Taken Order	Allow Transfers to another leave balance?	Exempt by leave policy type?	Auto request?	After leave policy type?	Reference number request?
Family Leave 1st 1 year	The employees' leave start date plus 1 months	1 months		0.0000	Cycle entitlement is accrued at the start of the leave cycle	The balance will be transferred to another rule	3	Allow with waiting	1	0		0
Family Leave	Start date of another rule plus 1 months	1 year	✓	0.0000	Cycle entitlement is accrued at the start of the leave cycle	The balance will be transferred to another rule	1	Allow with waiting	0	0		0

Maternity Leave

Leave Rule Description	Cycle Start Date	Cycle Length	Cycle Recurs	Entitlement Value	Leave Amount	Balance at the End of the Cycle	Leave Taken Order	Allow Transfers to another leave balance?	Exempt by leave policy type?	Auto request?	After leave policy type?	Reference number request?
Maternity Leave	This cycle has no start value			0.0000	Cycle entitlement is accrued at the start of the leave cycle	The balance will be transferred to another rule	0	Allow without a waiting		0		0

- Leave Type**
 A short description used to group similar types of leave rules. There are four leave types currently: Annual, Sick, Family and Maternity.
- Leave Definition**
 A leave definition is the description of the leave you want to manage, e.g. BCEA Annual leave.
- Leave Rule**
 Leave rules are linked to a leave definition, and is where all the rules relating to the leave is defined such as how the leave is accrued, how long the leave cycle is, etc.

Manage Leave Descriptions

The leave descriptions must be set according to your company's leave policy. The values that are set up here will appear as the default values for each new employee who is added to the specific company. Default values on this screen are set according to BCEA leave specifications.

Annual Leave

Leave Rule Description	Cycle Start Date	Cycle Length	Cycle Recurs	Entitlement Value
Annual Leave	The employees' leave start date	1 year	✓	15.0000
Annual Leave 6 months remaining	Start date of rule 'Annual Leave'	6 months	✓	
Annual Leave excess	This cycle has no start value			

Leave

After all changes have been made, remember to click on **Save**. (Fields with a grey border can be edited on this screen.)

Sick Leave				
Leave Rule Description	Cycle Start Date	Cycle Length	Cycle Recurs	Entitlement Value
Sick Leave first 6 months	The employees' leave start date	6 months		6.0000
Sick Leave remaining 30 months	Start date of rule 'Sick Leave first 6 months' plus 6 months	30 months		24.0000
Sick Leave 3 year cycle	Start date of rule 'Sick Leave remaining 30 months' plus 30 months	3 years	✓	30.0000

The Leave Grid

Leave Rule Description	Cycle Start Date	Cycle Length	Cycle Recurs	Entitlement Value	Leave Accrual
Annual Leave	The employees' leave start date	1 year	✓	15.0000	Period entitlement is accrued at the start of each month
Annual Leave 6 months remaining	Start date of rule 'Annual Leave'	6 months	✓		Cycle entitlement is accrued at the start of the leave cycle
Annual Leave excess	This cycle has no start value				

Balance at the End of the Cycle	Leave Taken Order	Allow transaction to exceed leave balance?	Exceed by how many days?	Note required?	After how many days?	Reference number required?
The balance will be transferred to rule 'Annual Leave 6 months remaining'	2	Allow without a warning		<input type="checkbox"/>		<input type="checkbox"/>
The balance will be transferred to rule 'Annual Leave excess'	1	Allow without a warning		<input type="checkbox"/>		<input type="checkbox"/>
	0	Allow without a warning		<input type="checkbox"/>		<input type="checkbox"/>

- Leave Rule Description**
 The **Leave Rule Description** is the descriptive name for the leave type.
 The first grid is for **Annual Leave**. The second for **Sick Leave**, third for **Family Responsibility Leave** and fourth for **Maternity Leave**.
- Cycle Start Date**
 The leave cycle start date will default to the employee date engaged. This is the only option for cycle start date and will default from the **Employee Details** screen. This date can be adjusted per employee on the **Employee Leave Details** screen.
- Cycle Length**
 The cycle length is pre-defined on this screen and cannot be edited per leave type. The cycle length per line are set up as per BCEA leave.
- Cycle Recurs**
 This column will be selected if according to BCEA the leave cycle should recur as per the cycle length according to the BCEA rules.
- Entitlement Value**
 Leave day entitlement is set up by default per leave type according to the BCEA rules. This column can be adjusted according to your leave policy.
 - 15 Days Annual Leave
 - 30 Days Sick Leave
 - 3 Days Family Responsibility Leave
- Leave Accrual**
 This field indicates whether the employee is entitled to a number of leave days per cycle or period.
 - Period entitlement is accrued at the beginning of each month.
 - Cycle Entitlement is accrued at the start of the leave cycle.

Leave

- **Balance at the End of the Cycle**

What should happen with the leave due at the end of the Cycle? There are 2 options that are already set up and cannot be edited.

- The Balance will be transferred to another "rule".
- The Balance will be cleared.

- **Leave Taken Order**

This is the sequence order per leave type in which leave days will be taken per transaction.

- **Allow Transactions to Exceed Leave Balance**

This column determines whether you want to be warned or stopped if the leave transaction you enter exceeds the leave that the employee has available.

There are 3 options for this column:

- **Allow with a warning** - If you want the system to warn you that the employee does not have enough leave days available and the leave will go into a negative, but will still allow the transaction.
- **Allow without a warning** - If you want to allow the leave days to go into negative leave without a warning.
- **Do not allow** - If you want to be stopped. By selecting this option, the employee will not be allowed to go into negative leave at any time.

- **Exceed by how many days**

If the system does allow the negative transaction, you can enter the number of days they are allowed to exceed with.

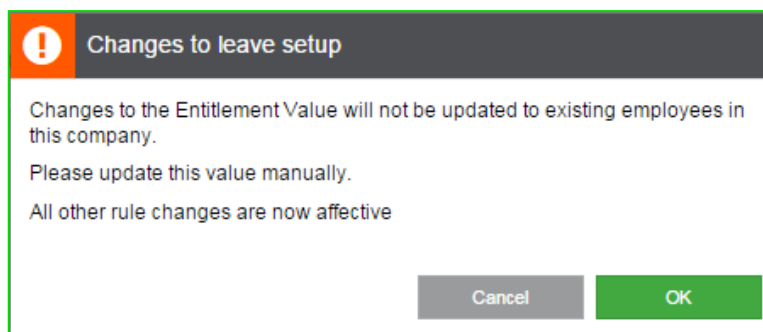
- **Note Required**

Select if the system should remind you that a note is required for a leave transaction.

- **After How Many days**

Enter the number of days, which may be taken before a note is required. The number of days will be taken over to all leave lines for the type.

Once all parameters have been set up on this screen **SAVE** at the bottom right corner to save all changes made to the original setup. Take note of the following screen you will see when saving the information.



Leave

Employee Leave Details

Manage employees' leave balances

In order to manage a single employee's leave details, select **Leave** from the main navigation bar and select **Employee leave details**.

Leave rule description	Entitlement per cycle	Cycle start date	Next cycle start date	Opening balance	Accrual this period	Taken this period	Closing balance	Planned leave
Annual Leave	15.0000	2015-03-01	2016-02-29	0.00000	1.2500	0.0000	1.2500	0.0000
Annual Leave 6 months remaining		2015-03-01	2016-02-29	0.00000	0.0000	0.0000	0.0000	0.0000
Annual Leave excess				0.00000	0.0000	0.0000	0.0000	0.0000

Leave rule description	Entitlement per cycle	Cycle start date	Next cycle start date	Opening balance	Accrual this period	Taken this period	Closing balance	Planned leave
Sick Leave 10 days	10.0000	2015-03-01	2016-02-29	0.00000	0.0000	0.0000	0.0000	0.0000
Sick Leave 10 days remaining	10.0000	2015-03-01	2016-02-29	0.00000	0.0000	0.0000	0.0000	0.0000
Sick Leave 10 days excess	10.0000	2015-03-01	2016-02-29	0.00000	0.0000	0.0000	0.0000	0.0000

Leave rule description	Entitlement per cycle	Cycle start date	Next cycle start date	Opening balance	Accrual this period	Taken this period	Closing balance	Planned leave
Parental Leave 10 days	10.0000	2015-03-01	2016-02-29	0.00000	0.0000	0.0000	0.0000	0.0000
Parental Leave 10 days remaining	10.0000	2015-03-01	2016-02-29	0.00000	0.0000	0.0000	0.0000	0.0000
Parental Leave 10 days excess	10.0000	2015-03-01	2016-02-29	0.00000	0.0000	0.0000	0.0000	0.0000

Leave rule description	Entitlement per cycle	Cycle start date	Next cycle start date	Opening balance	Accrual this period	Taken this period	Closing balance	Planned leave
Maternity Leave 10 days	10.0000	2015-03-01	2016-02-29	0.00000	0.0000	0.0000	0.0000	0.0000
Maternity Leave 10 days remaining	10.0000	2015-03-01	2016-02-29	0.00000	0.0000	0.0000	0.0000	0.0000
Maternity Leave 10 days excess	10.0000	2015-03-01	2016-02-29	0.00000	0.0000	0.0000	0.0000	0.0000

Leave settings

Indicate whether the employee's leave is based on calendar days or on working days. If you indicate working days, ensure that the employee's working days per week are indicated correctly. The default working days are set to Monday to Friday.

For example: an employee accrues 20 calendar days annual leave per year, and when the employee takes leave, weekends must be taken into consideration when calculating the number of leave days taken.

Another employee might accrue 15 working days annual leave per year, and when leave is taken, only working days are taken into consideration when calculating the number of leave days taken.

The employee leave balances can be set up from this view:

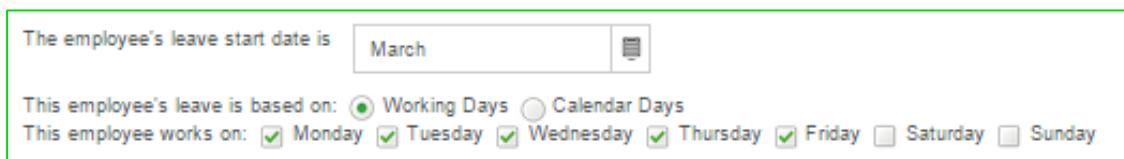
Employee Leave Screen

Annual Leave								
Leave rule description	Entitlement per cycle	Cycle start date	Next cycle start date	Opening balance	Accrual this period	Taken this period	Closing balance	Planned leave
Annual Leave	15.0000	2015-03-01	2016-02-29	0.00000	1.2500	0.0000	1.2500	0.0000
Annual Leave 6 months remaining		2015-03-01	2016-02-29	0.00000	0.0000	0.0000	0.0000	0.0000
Annual Leave excess				0.00000	0.0000	0.0000	0.0000	0.0000

- Leave rule description**
The **Leave rule description** is the descriptive name for the leave type.
- Entitlement per cycle**
The leave entitlement will default from the **Leave Setup** screen. The value can be adjusted per employee on the **Employee leave details** screen.
- Cycle Start Date**
The leave cycle start date will default from the **Employee details** screen from the **This employee started working on** field. This field can be edited per employee.

Leave

- **Next Cycle Start Date**
This date will automatically calculate based on the cycle start date and cycle length as set up on the **Leave Setup** screen.
- **Opening Balance**
This option is to enter an opening balance when doing a leave take on.
- **Accrual this Period**
The leave days that accrues per period will show in this column.
Example: 15 days per year in a 1 year cycle. $15 / 12 = 1.25$ days accrual per monthly pay cycle.
- **Taken this Period**
When a leave transaction is entered the total number of leave days for the current period will show in this column.
- **Closing Balance**
Opening balance + Accrual this period – Taken this period = Closing balance
- **Planned leave**
Future leave transactions will display in this column until the user rolls over to the month the days are in and where they will then move to the taken this period column.
- **Leave Settings**



The employee's leave start date is

This employee's leave is based on: ☒ Working Days ☐ Calendar Days

This employee works on: ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday ☐ Sunday

RSA Public Holidays will be set up on the Calendar.

Employees' leave can be set up according to **Working days** or **Calendar Days**. If the **Working days** option is selected, the user should select the days from Monday – Sunday

- **Add New Transaction**
Always **Save** all changes to the **Employee Leave** screen before clicking on the **Add New Transaction** button.
The **Add New Transaction** button will be greyed out if you do not **Save** the changes.

Leave

Leave on the payslip

From the main navigation bar, select **Leave** and then **Employee leave details**.

Leave type description	Collected per cycle	Cycle start date	Next cycle start date	Opening balance	Annual balance	Taken this period	Closing balance	Planned leave
Annual Leave	15.0000	2018-03-01	2018-03-01	0.0000	1.0000	0.0000	1.0000	0.0000
Annual Leave 6 months remaining		2018-03-01	2018-03-01	0.0000	0.0000	0.0000	0.0000	0.0000
Annual Leave 6 months				0.0000	0.0000	0.0000	0.0000	0.0000
Sick Leave	8.0000	2018-03-01	2018-03-01	0.0000	0.0000	0.0000	0.0000	0.0000
Sick Leave 3 months	24.0000	2018-03-01	2018-03-01	0.0000	0.0000	0.0000	0.0000	0.0000
Sick Leave 3 years	36.0000	2018-03-01	2018-03-01	0.0000	0.0000	0.0000	0.0000	0.0000
Family Leave	3.0000	2018-03-01	2018-03-01	0.0000	0.0000	0.0000	0.0000	0.0000
Family Leave 3 months	9.0000	2018-03-01	2018-03-01	0.0000	0.0000	0.0000	0.0000	0.0000
Family Leave 3 years	12.0000	2018-03-01	2018-03-01	0.0000	0.0000	0.0000	0.0000	0.0000
Maternity Leave	0.0000			0.0000	0.0000	0.0000	0.0000	0.0000

The **Leave** tab provides you with a leave processing screen. Capture leave by clicking on the **Add New Transaction** button.

Processing the leave will be done on the following screen:

Add Transaction

The employee is taking: Annual Leave

From date: [Date Picker]

To date: [Date Picker]

Units: [Text Input]

Comments: [Text Area]

Reference Number: [Text Input]

Was a note provided? ☐

Click or drag document to upload

Cancel OK

- The type of leave that will be processed can be selected by clicking on the dropdown arrow next to **The employee is taking** field.
- **From date:** The first day of the employee's leave.
- **To date:** The last day of the employee's leave.
- **Units:** The number of leave days that must be deducted from the employee. The system calculates the number of days based on the dates entered, the employee's leave settings (so whether calendar days or working days must be used) and public holidays. You can overwrite the calculated value (if the employee only took half day leave, for example).
- Type any comments in the **Comments** field.
- **Reference Number:** Enter a reference number for the transaction. This field will only be available if the setting was activated on the Manage Leave Definitions view.

Leave

- **Was a note provided?** Check this check box if the employee provided a note for the leave, for example a sick note. This field will only be available if the setting was activated on the **Manage Leave Definitions** view.
- Upload documentation, such as a leave application form or sick notes, by clicking or dragging the document to the **Click or drag document to upload** field. You can upload 2 files with a maximum size of 200 kB. You are able to upload the following file types: bmp, jpg, jpeg, gif, png, tif, tiff, doc, docx, xls, xlsx and pdf.
- Overlapping Transactions

The screenshot shows the 'Add Transaction' form with the following fields and values:

- The employee is taking:** Sick Leave
- From date:** 2015-03-08
- To date:** 2015-03-08
- Units:** 1.0000 (calculated 1.0000)
- Comments:** (empty text area)
- Reference Number:** 02
- Was a note provided ?** ☒ (A note is required)

A red warning message is displayed: "This leave transaction overlaps with an existing leave transaction." Below the warning is a dashed box with the text "Click or drag document to upload". At the bottom are "Cancel" and "OK" buttons.

When the same date is selected on another transaction the system will warn you and will not calculate this day as a transaction again.

How to Pay Weekly and Fortnightly Employees for Annual Leave

You have to pay the employee his/her full salary/wage they would have earned during the period of leave. In addition, any fluctuating payments that the employee won't receive during the period of leave, must be averaged over the preceding 13 weeks and paid in addition to the employee's fixed salary/wage. An employer must pay an employee for leave taken before the beginning of the period of leave or by agreement, on the employee's usual pay day.

In practise, monthly paid/salary paid employees are typically paid on their normal pay day, while weekly and fortnightly/wage earners are typically paid for leave in the last period before they go on leave. The system has a built-in leave pay function to help you pay your employees for annual leave.

Leave

Leave FAQs

- Must I use the Leave function?
The Leave function has 3 objectives:
 1. To assist you to calculate the earnings, deductions, company contributions and fringe benefit values for the leave periods (i.e. the weeks while the employee is on leave),
 2. To calculate the correct amount of Tax, UIF and SDL for the Leave Pay periods, and
 3. To assist you to keep your leave transactions up to date, if you have the leave module.




Even if you want to input the Leave Pay amounts manually, we advise that you activate the Leave Pay function to calculate the correct statutory contributions.

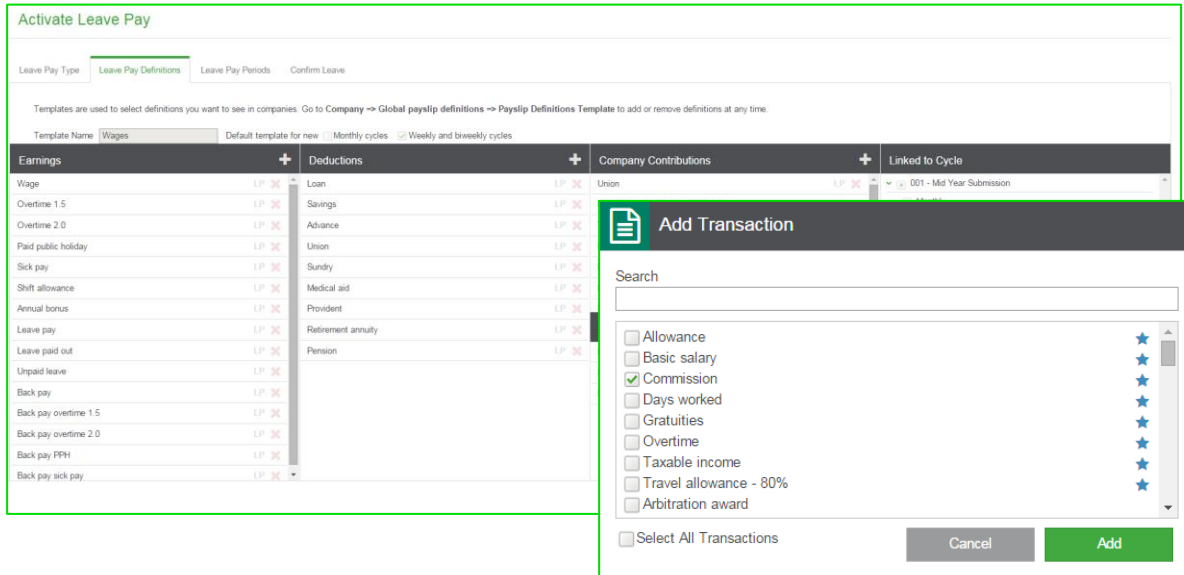
- When must I activate Leave Pay?
Leave Pay must be activated in the last period the employee works and gets paid, before going on leave. Leave Pay can be activated by clicking on the **Activate Leave Pay** button, displayed on a weekly or fortnightly employee's payslip view.
- What happens when I activate Leave Pay?
By activating the Leave Pay option you will see the following screen:

On the **Leave Pay Type** tab you can choose between two options:

- **Normal Leave Pay**
Leave that is paid out normally.
- **Late Leave Pay**
Select this option if you are paying the leave late.

Leave

On the **Leave Pay Definitions** tab you are able to remove or add transactions that you feel should be a part of the calculation. Sage Business Cloud Payroll has placed default transactions here for you to choose from. Click on the grey  to add it to the calculation. If the button turns green  it has been selected. If a transaction is not there to select from, add it by clicking on the  button and add it.

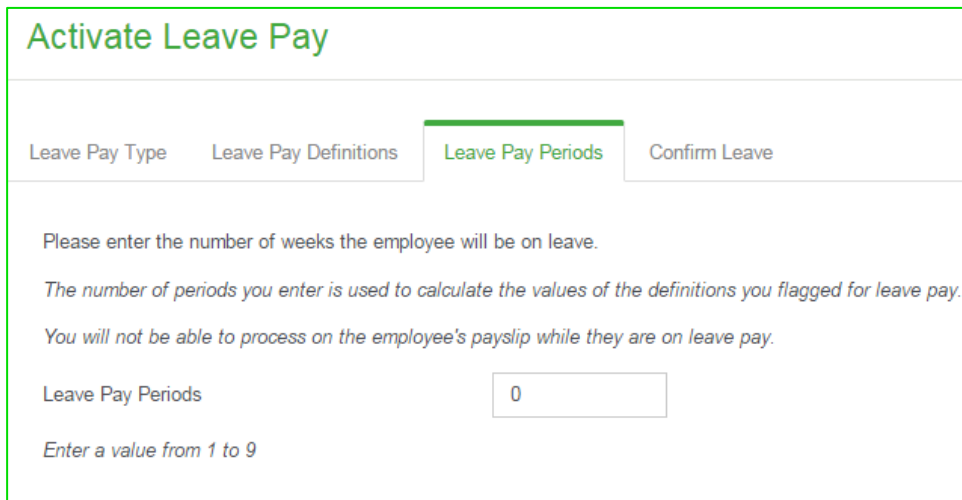


The screenshot shows the 'Activate Leave Pay' window with the 'Leave Pay Definitions' tab selected. The window contains a table of default transactions categorized into Earnings, Deductions, and Company Contributions. An 'Add Transaction' dialog is open, showing a list of transactions with checkboxes. The 'Commission' transaction is selected, indicated by a green checkmark. The dialog also includes a search bar, a 'Select All Transactions' checkbox, and 'Cancel' and 'Add' buttons.

Template Name	Wages	Default template for new	Monthly cycles	Weekly and biweekly cycles
Earnings				
Wage				
Overtime 1.5				
Overtime 2.0				
Paid public holiday				
Sick pay				
Shift allowance				
Annual bonus				
Leave pay				
Leave paid out				
Unpaid leave				
Back pay				
Back pay overtime 1.5				
Back pay overtime 2.0				
Back pay PPH				
Back pay sick pay				
Deductions				
Loan				
Savings				
Advance				
Union				
Sundry				
Medical aid				
Provident				
Retirement annuity				
Pension				
Company Contributions				
Union				

The calculations for all the Leave Pay periods are done 'in advance'. If you indicated that the system must calculate Leave Pay values for specific definitions, you will see the Leave Pay values for these definitions on the payslip.

On the **Leave Pay Periods** tab you are able to specify the number of periods that must be processed.



The screenshot shows the 'Activate Leave Pay' window with the 'Leave Pay Periods' tab selected. The window contains a text area with instructions and a numeric input field for 'Leave Pay Periods'. The input field is currently set to 0.

Please enter the number of weeks the employee will be on leave.

The number of periods you enter is used to calculate the values of the definitions you flagged for leave pay.

You will not be able to process on the employee's payslip while they are on leave pay.

Leave Pay Periods

Enter a value from 1 to 9

For weekly paid employees, you can enter 1 to 9 Leave Pay periods, where 1 period is 1 week. For fortnightly paid employees, you can enter 1 to 9 Leave Pay periods, where 1 period is 2 weeks. If the leave module is active for this company, you can capture the employee's leave transaction when activating Leave Pay.

Leave

On the **Confirm Leave** tab you are able to confirm that the information given is correct and capture the leave transaction to process the leave.

Activate Leave Pay

Leave Pay Type Leave Pay Definitions Leave Pay Periods **Confirm Leave**

This employee is going on leave for 1 weeks

Capture Leave Transaction Now

After confirming the information is correct, you will be prompted to add the leave transaction with the **Add Transaction** screen.

Add Transaction

The employee is taking:

Please select

From date:

To date:

Units:

Comments:

Drag And Drop your file here

Cancel

OK

Once all the information has been captured click on the **OK** and **Finish** buttons.

The following screen will be displayed:

002
Delta
1 Leave Pay period was activated

IRPS Validations End Employment Delete Employee Deactivate Leave Pay

Employee Details Hours and Rates ETI **Payslip** Private Benefits Payslip Details Month To Date Year To Date Leave Leave Transactions

Earnings	+	Deductions	+	Company Contributions	+
Wage	7,673.08	Tax	2,292.70	Unemployment insurance fund	37.18
Wage - Leave Pay	7,673.08	Tax - Leave Pay	1,544.00	Unemployment insurance fund - Leave Pay	37.18
Overtime 1.5	575.48	Unemployment insurance fund	37.18	Skills development levy	86.32
Overtime 2.0	383.65	Unemployment insurance fund - Leave Pay	37.18	Skills development levy - Leave Pay	76.73
				Total	237.41
				Fringe Benefits	+
Total	16,305.29	Total	3,911.06	Total	0.00
Nett Pay					12,394.23

Leave

- What happens to the employees' payslips while they are on leave?
The employees' payslips are frozen while they are on leave, to ensure that you don't accidentally process on their payslips while they are on leave. A message next to the employee's name indicates the remaining number of leave periods.

Certain fields, such as the employee's tax status, which has an impact on the employee's tax, UIF and SDL calculations, is also disabled while the employee is on leave.

The payslips will be active again when you roll into the period the employee returns from leave.

- What must I do if the employee comes back to work early?
It sometimes happens in practice that an employee returns to work before the end of their Leave Pay period, and starts working again.

The employee's payslip will be frozen, as the system is expecting the employee to still be on leave.

In order to activate the employee's payslip, you need to **Deactivate Leave Pay**.



Important Information

Please note that it is important that you understand the consequences of deactivating Leave Pay. Please refer to the "Deactivate Leave Pay" section below for more information.

Deactivate Leave Pay

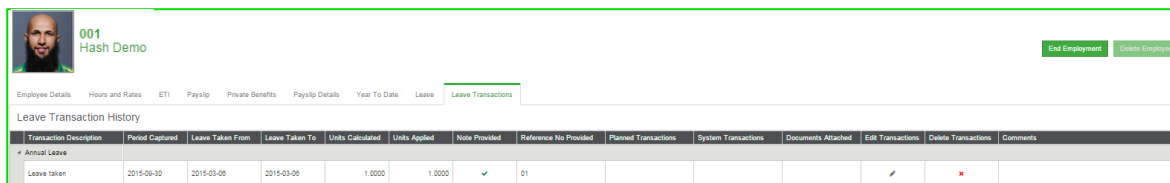
It is not advisable to deactivate Leave Pay unless the employee returns to work before their scheduled return date.

- What should I be aware of if I deactivate Leave Pay?
 - The employee has already been paid up to the end of the Leave Pay period.
 - The system will calculate transactions from the period in which Leave Pay was deactivated - you will have to manually adjust all the values otherwise the employee will be paid again for the same period.
 - The tax will be higher, as the period over which the employee has earned their wage is now shorter - when activating Leave Pay, the tax factor is calculated up to the end of the Leave Pay period. When deactivating Leave Pay, the tax factor is only calculated up to the end of the current period.
 - You will have to manually correct leave transactions that were captured when activating Leave Pay.
- Can I activate Leave Pay again?
Yes you can, however this Leave Pay activation will not take any previous Leave Pay activation into account.

Leave

Employee Leave Transactions

From the main navigation bar select **Leave** and then **Employee leave transactions**.



Transaction Description	Period Captured	Leave Taken From	Leave Taken To	Units Calculated	Units Applied	Note Provided	Reference No Provided	Planned Transactions	System Transactions	Documents Attached	Edit Transactions	Delete Transactions	Comments
Leave taken	2015-08-30	2015-03-08	2015-03-08	1,000	1,000	✓	01						

View the employee's leave transactions on this view. This includes transactions captured by the user as well as system generated transactions.

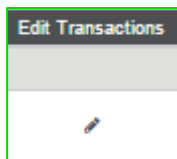
Field	Description
Transaction Description	<p>This is a description of the type of transaction:</p> <ul style="list-style-type: none">• Leave taken – A leave transaction captured by the user.• Transaction deleted – A leave transaction which was deleted by the user.• Transfer balance from 'Rule Description' – This transaction indicates the leave balance which remained on a leave rule at the end of the cycle and was transferred to another rule.• Transfer balance to 'Rule Description' – This transaction indicates the leave balance which remained on another leave rule at the end of the cycle and was transferred to this rule.• Closing balance cleared at end of cycle – This transaction indicates the value of leave which was lost at the end of a cycle. In other words, the leave balance was not transferred to another leave rule.• Opening balance changed – This transaction indicates that the user changed the employee's opening leave balance.• Entitlement per Cycle changed - Accrual this Period adjusted – This transaction indicates a change to the employee's Entitlement per Cycle value, which results in a change in the employee's Accrual this Period value from the period in which the change was made.
Period Captured	This indicates the payroll period in which the transaction is captured.
Leave Taken From	The first day of the employee's leave.
Leave Taken To	The last day of the employee's leave.
Units Calculated	The number of leave days that must be deducted from the employee. The system calculates the number of days based on the dates entered on the employee's leave setting (whether calendar days or working days must be used) and public holidays. You can overwrite the calculated value with your own value.
Units Applied	This value will be the same as the 'Units Calculated' value, unless the value was changed by the user. The value displayed here is the number of days which is taken into consideration when calculating the employee's Closing Balance.
Note Provided	A <input checked="" type="checkbox"/> in this column indicates that a note has been provided.
Reference No Provided	A <input checked="" type="checkbox"/> in this column indicates that a reference number has been provided.
Planned Transactions	A <input checked="" type="checkbox"/> in this column indicates that the leave transaction dates fall in a future payroll period. This transaction is not taken into consideration when calculating the Closing Balance until the period where the leave starts falls within the processing period dates. Thus, if you are in September and capture a transaction from 5 to 6 October, the transaction will only be taken into consideration when you roll into October.

Leave

System Transactions	A <input checked="" type="checkbox"/> in this column indicates that it is a system generated transaction.
Documents Attached	A <input checked="" type="checkbox"/> in this column indicates that there are documents attached to the transaction.
Edit Transactions	Explained below.
Delete Transactions	Explained below.
Comments	If any comments were made, it will be displayed in this column.

- Edit Transactions**

You can edit leave transactions from the **Leave Transaction** view. The correct dates can then be entered and the correct days will be recalculated.



Edit Transaction

The employee is taking
Annual Leave

From date
To date

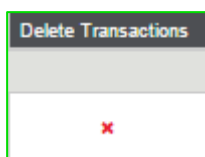
Units
1.0000
(calculated 1.0000)

Comments

Click or drag document to upload

Cancel
OK

- Delete Transactions**



Delete Transaction

Comments

Are you sure you want to delete this transaction?

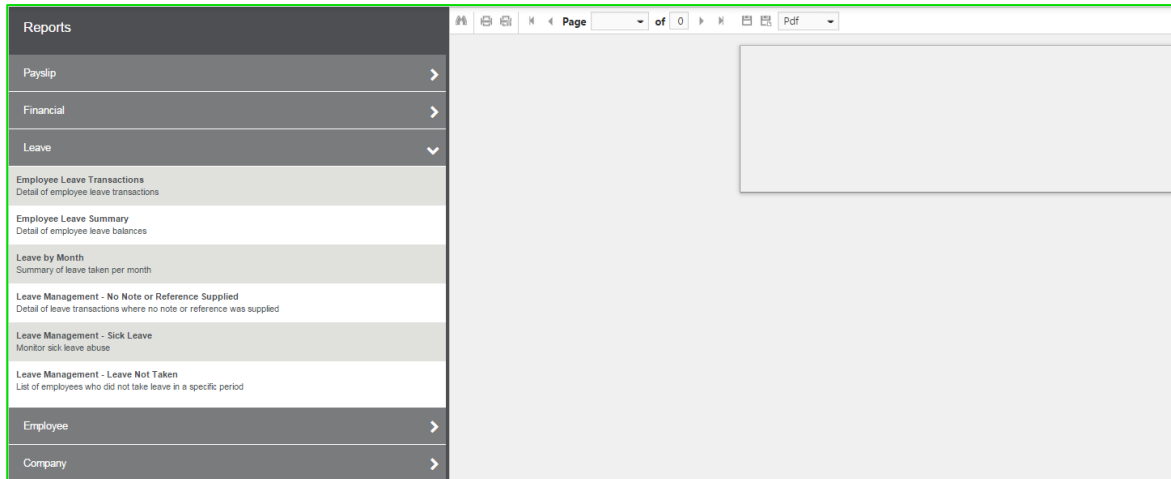
Cancel
Yes

Leave

Confirm that you want to delete the leave transaction by clicking on the **Yes** button. This procedure will help you to keep record of deleted leave transactions.

Leave Reports

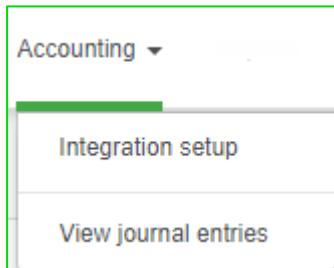
The leave reports can be seen by clicking on **Reports** in the main navigation bar and selecting the **Leave** option on the left.



There are 6 basic leave reports that you can use to see information regarding leave.

Report	Description
Employee Leave Transaction	Detail of employee leave transactions.
Employee Leave Summary	You will see the details of the employee leave balances.
Leave by Month	Summary of leave taken per month.
Leave Management - No note or Reference Supplied	Detail of leave transactions where no note or reference number was supplied.
Leave Management - Sick Leave	Monitor sick leave abuse.
Leave Management - Leave Not Taken	List employees who did not take leave in a specific period.

Accounting Integration



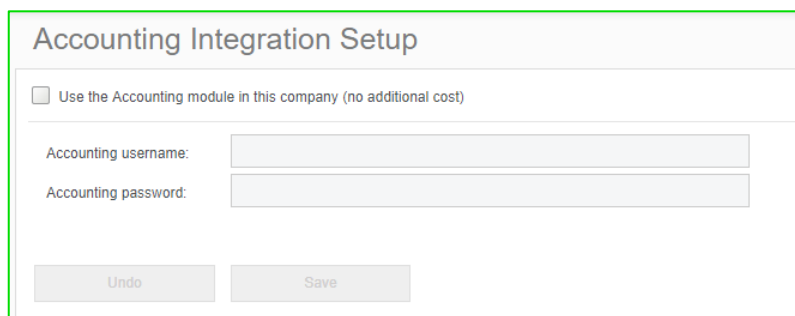
The Accounting dropdown view is separated into 2 sections:

- Integration setup
- View journal entries

Accounting Integration Module

From the main navigation bar select **Accounting** and then select **Integration setup**.

- In order to integrate with Accounting you will first need to sign up for the Accounting module.
- The integration between the two modules will carry no extra costs.
- You must be a registered user on Accounting in order to use the integration. If you don't have valid Accounting login details, you cannot use the module.
- When you activate the module you need to enter your Accounting username and password. It is not mandatory at that stage, but you won't be able to link the accounts and submit to Accounting if you don't enter the details.

A screenshot of the 'Accounting Integration Setup' form. At the top is the title 'Accounting Integration Setup'. Below it is a checkbox labeled 'Use the Accounting module in this company (no additional cost)'. Underneath the checkbox are two input fields: 'Accounting username:' and 'Accounting password:'. At the bottom of the form are two buttons: 'Undo' and 'Save'.

- Check the Use the Accounting module in this company (no additional cost) check box. Enter your Accounting username and password and click on the **Save** button.
- Accounts information
 - Accounts are linked per cycle.
 - Each cycle must first be linked to a Accounting company.
 - Multiple Payroll cycles can be linked to the same Accounting company.

Accounting Integration

- The accounts that you have set up in the selected Accounting company is displayed.
 - You need to click on the account you want to link.
 - It is not mandatory to link all the definitions to accounts.

- The journal can also be posted from the journal history view.

- The user can post history journals. It is therefore not required to post the journal before rolling over.
- When posting the journal, verify that all definitions with financial values are linked to an account. You will not be able to post if you have not linked accounts to all definitions with financial values.
- To post a journal, click on the **“Post journal ...”** button.
- A **“post journal entries”** popup will display.
- Click on **Generate**.
- If there are unlinked accounts, a popup will display to link the accounts. Unlinked accounts have an exclamation mark. Link all unlinked accounts.
- If all accounts are linked, then a summary and detail audit report is displayed.
- Reconcile these reports first. Once entries are posted, they are posted live through to their journal.

Accounting Account	Debit Amount	Credit Amount	Total
Salary Control Account	13392.46	50000.00	-36607.54
Salary Expense	50000.00	0.00	50000.00
Salary Liability	0.00	13392.46	-13392.46
TOTALS	63392.46	63392.46	0.00

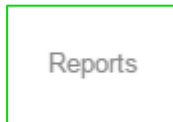
- If you are satisfied with the values that will be posted and the accounts they will be posted to, you need to check the **I have checked the audit report and want to post the journal** check box, and then click on the **Post** button.

Reports and Exports

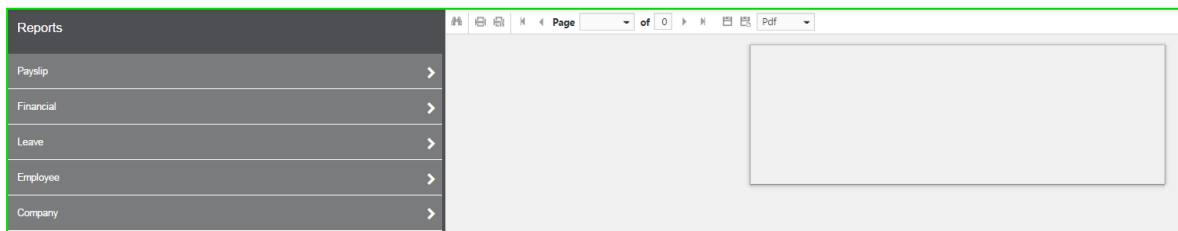
- The journal entries are then updated to the Accounting live company, so when you log into Accounting, your journal is already updated with the values. You don't have to do anything on Accounting's side.

Reports and Exports

From the main navigation bar select **Reports**.



The reports you are able to choose from are available on the left.



Select a section and then a report to the left, then click on **Preview**.

Pay Register

Select the pay period

Sort by

None

then by

Surname

Back to Reports

Preview

Reports and Exports

The report will be displayed on the right. Now you can print the report to a printer.



Pay Register

Select the pay period:

30 September 2015

Sort by:

Department

then by:

Employee code

Show sub totals ☒

Back to Reports

Preview

Pay Register

Printed for period ending 2015-09-30

Printed for Mid Year Submission: Monthly

Employee code	01	Employee name	Me Export	Pay period	2015-09-30
Start date	2015-03-01	Rate per day	909,0909	Pay method	Cash
Rate per hour	113,6364				
Earnings	Input	Amount	Deductions	Amount	Opening Balance
Basic salary		20 000,00	Tax	3 298,58	
Travel allowance		2 000,00	Unemployment insurance fund	148,72	
Total earnings		22 000,00	Total deductions	3 447,30	
Total company contributions		364,72	Nett pay	18 552,70	
Total fringe benefits		0,00	Total cost	22 364,72	
Provision for tax on annual bonus YTD		0,00			
TOTALS FOR DEPARTMENT Not Defined					
Earnings	Input	Amount	Deductions	Amount	Opening Balance
Basic salary		20 000,00	Tax	3 298,58	
Travel allowance		2 000,00	Unemployment insurance fund	148,72	
Total Earnings		22 000,00	Total Deductions	3 447,30	
Total Company Contributions		364,72	Nett Pay	18 552,70	
Total Fringe benefits		0,00	Total Cost	22 364,72	
Provision for tax on annual bonus YTD		0,00			
GRAND TOTALS					
Earnings	Input	Amount	Deductions	Amount	Opening Balance
Basic salary		20 000,00	Tax	3 298,58	
Travel allowance		2 000,00	Unemployment insurance fund	148,72	
Total Earnings		22 000,00	Total Deductions	3 447,30	
Total Company Contributions		364,72	Nett Pay	18 552,70	
Total Fringe benefits		0,00	Total Cost	22 364,72	
Provision for tax on annual bonus YTD		0,00			

Company name Mid Year Submission

Company address 7 Lotus Avenue, Alberton, Gauteng, 1449

Employee code 01 Employee name Me Export

Employee address This street, That suburb, Those town, 0001

Start date 2015-03-01

Job title

Pay date 2015-09-30

Company name Mid Year Submission

Company address 7 Lotus Avenue, Alberton, Gauteng, 1449

Employee code 01 ID number 7001015000004

Employee name Me Export

Employee address This street, That suburb, Those town, 0001

Start date 2015-03-01

Job title

Rate per hour 113,6364

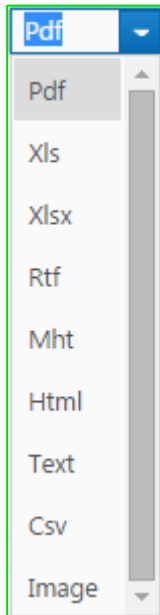
Pay date 2015-09-30

Earnings	Units	Amount	Deductions	Opening balance	Amount
Basic salary		20 000,00	Tax		3 298,58
Travel allowance		2 000,00	Unemployment insurance fund		148,72
Total earnings	22 000,00		Total deductions		3 447,30
			Nett pay		18 552,70

Company Contributions	Amount YTD	Totals	Amount
Unemployment insurance fund	148,72	Taxable earnings	141 600,00
Skills development levy	218,00	Taxable company contributions	0,00
		Fringe benefits	0,00
		Provision for tax on annual bonus	0,00
		Tax paid	20 594,08
		Leave	Closing Balance
		Annual leave	0,2500

Reports and Exports

Alternatively, you can export the report to any of the following formats:



Email payslips


You can email current and previous plain paper payslips to your employees.



Important Information


Please note that payslips are emailed to the email addresses entered on the employees' Employee details views. Please ensure that the correct email address is entered.

Follow these steps to email a payslip:

1. From the main navigation bar select **Reports** or select **Payroll** and then **Print or email payslips**.
2. From the reports selection bar select the drop down arrow next to Payslip.
3. Select the Current/Previous payslip – Plain Paper Payslip option.
4. Select the pay period.
5. Select the specific employees you want to include in the report.
6. Select whether to exclude employees with zero or negative nett pay.
7. Select whether you want to sort this report by
 - **Department**, or
 - **Pay Point**.The default selection is "**None**".
8. Select whether you want to sort the employees by
 - Surname (default sort option), or
 - Employee code.
9. Select the pay date.
10. Select the type of rate, which balance to use, company contributions, fringe benefits, private benefits and which leave balances to print.
11. Select **Preview**.
12. Click on .

UIF Declaration

13. A popup with the following information will display:

 Please verify the employees' email addresses before sending.

Payslips will be emailed to the following employees.

Name	Email
------	-------

Payslips cannot be emailed to the following employees.
To email a payslip, enter an email address on the Employee Details view.

Name	Email
Delta	

☐ Password protect the payslips?
The employee's date of birth in the format yyyymmdd is used as the password for the PDF payslip. If you select to password protect the payslips, please let the employees know what the password is.

Send Payslips

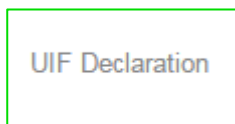
Cancel

The employee's date of birth is used as the password, and the format is yyyymmdd.

Click on **Send Payslips** to email the payslips to the listed employees. The employees will receive an email with a PDF payslip attachment.

UIF Declaration

From the main navigation bar click on **UIF Declaration**.



UIF Submission

The contact details on UIF Submission view defaults from UIF contact person details entered on the **Company...Company Details** view. If no information is saved on the **Company Details** view, the user will have to manually enter the details every time a submission is done.

UIF Submission

UIF Submission

Contact Person Name

Name Surname

Contact Person Telephone Number

0113044270

Contact Person Email Address

name.surname@gmail.com

Type of Run

Live

Run for Date

2015-03-06

File Extension

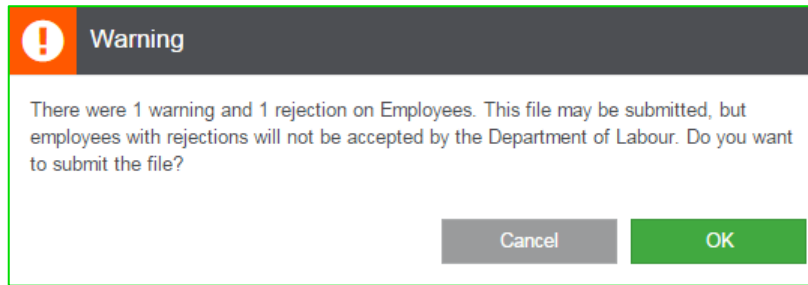
001

Submit UIF

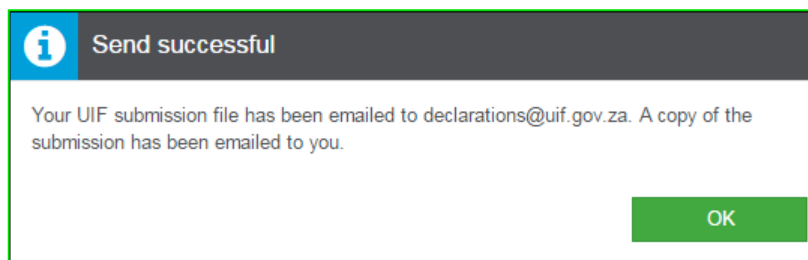
UIF Submission Report

UIF Declaration

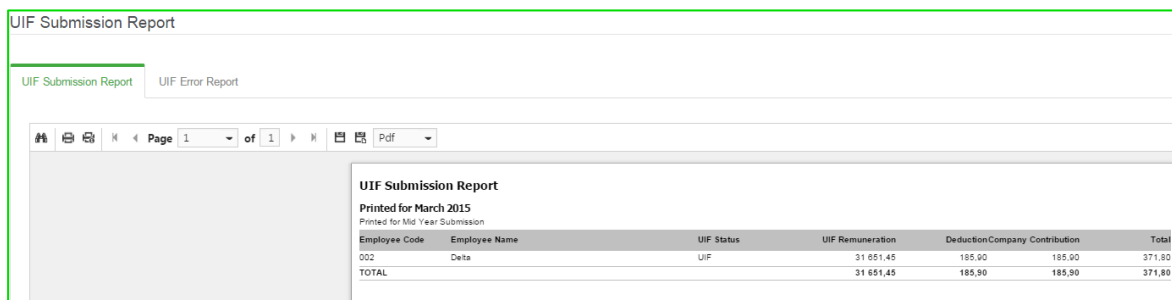
- Once all the required information is entered, click on the **Submit UIF** button.
- The file is now checked for validation errors. A popup will display if there are errors – the user can select to submit the file with the errors, or to stop the submission and view the error report.



- After validation, Sage Business Cloud Payroll will email the submission directly to the UIF email address and also CC's the user.



The UIF Submission Report and UIF Error Report are then generated and can be previewed on screen.

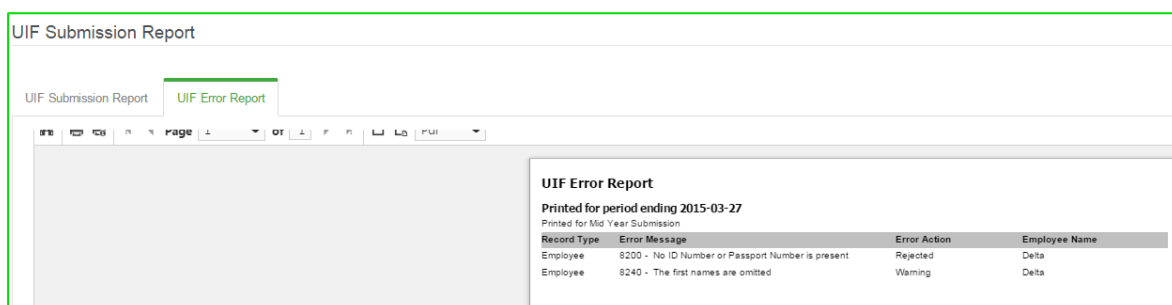


UIF Submission Report

UIF Submission Report UIF Error Report

Page 1 of 1 Pdf

UIF Submission Report					
Printed for March 2015					
Printed for Mid Year Submission					
Employee Code	Employee Name	UIF Status	UIF Remuneration	Deduction Company Contribution	Total
002	Delta	UIF	31 651,45	185,90	371,90
TOTAL			31 651,45	185,90	371,90



UIF Submission Report UIF Error Report

Page 1 of 1 Pdf

UIF Error Report			
Printed for period ending 2015-03-27			
Printed for Mid Year Submission			
Record Type	Error Message	Error Action	Employee Name
Employee	8200 - No ID Number or Passport Number is present	Rejected	Delta
Employee	8240 - The first names are omitted	Warning	Delta