# Accentra Primo Payroll May 2019 (R2) Release Notes v1.0.301

Release date 31<sup>st</sup> May 2019



#### Accentra Technologies Limited

Warnford Court 29 Throgmorton Street London, EC2N 2AT

#### Confidential

The contents of this document are strictly confidential. No part of the contents of this document may be reproduced or transmitted in any form or by any means without the written permission of Accentra Technologies Limited.

#### Disclaimer

While all reasonable efforts have been taken to assure the accuracy and correctness of this manual and software, Accentra does not assume any liability whatsoever directly or indirectly for any errors or omissions and for its suitability for any specific purpose. The content of this document and software may change without notice and without any commitment on the part of Accentra.

# Table of Contents

L	New	Features	Error! Bookmark not defined.
	1.1	What is FlexEarn?	Error! Bookmark not defined.
	1.2	How to Create a FlexEarn Account	Error! Bookmark not defined.
	1.3	Using FlexEarn	4
	1.3.1	How to Integrate with your FlexEarn Account	4
	1.3.2	FlexEarn Cashout Process	5
	1.3.3	Communication and Reports	6
2	Suppo	ort	7

# I NEW FEATURE - FLEXEARN

#### I.I WHAT IS FLEXEARN?

- FlexEarn gives your employees instant access to earnings whenever needed, not just on payday.
- Any advances made are then automatically deducted from employees' payroll, thanks to FlexEarn's integration with Accentra.
- FlexEarn is free for companies with no changes to payroll or cashflows required.
- The service is proven to reduce employee absenteeism and turnover while increasing engagement and satisfaction.

## **I.2 HOW TO CREATE A FLEXEARN ACCOUNT**

- a) Visit <u>www.flexearn.com</u> and click the Join Us button
- b) Fill in the contact form and a FlexEarn representative will get in touch to complete your registration
- c) Log in to your account and open the Account tab
- d) Make a note of the API Key and Secret Key

## **I.3 USING FLEXEARN**

#### **1.3.1 HOW TO INTEGRATE WITH YOUR FLEXEARN ACCOUNT**

- a) Open the relevant company from the Company List
- b) Click on the API plug icon at the top of the screen, next to Settings



- c) Click the 'FlexEarn' logo and then click the 'I wish to Signup' button
- d) If you do not have any employees paid monthly, you will receive a message stating FlexEarn services only support employees paid through monthly frequency
- e) Enter the Client ID (API Key) and Client Secret (Secret Key) from your FlexEarn Account
- f) You have the option to rename the deduction description
- g) Click 'Connect' (Once connection has been established, the 'Require payment Confirmation' option will be ticked)

FLEXEARN API INTEGRATION	Connect
Please follow the below steps to setup an account with FlexEarn and input the credentials to complete the integratio	on with Primo Payroll
• Go to <u>flexearn.com</u>	
Click Join Us	
Fill the form and submit	
<ul> <li>FlexEarn customer service team will be in touch with you to setup your account</li> </ul>	
Once your account is ready, Login and Go to Account > Copy the API & Secret Key and paste it in the fields below	
APIKey 🕐	
Secret Key 🕐	
Deduction Description ② Salary Advance	

h) Click 'Email' to notify your employees about FlexEarn

#### i) Click 'Submit' to send employee data to FlexEarn



j) Once you are successfully integrated with FlexEarn you will see a tick next to the FlexEarn logo

Primo Flexearn Integratio (ID: 117	3) 28 MAY 2019 HMRC TAX WEEK 8 TAX MONTH	2	Joe Bloggs 🔻	*	¥ ¥	?	PrimoPayroll
API Integrations							Close
PrimoPayroll provides a platform to integrate w use which is open for Integration, do let us know	ith our various partners an endless opportunity to build v and we will build it for you.	your connected business. If you do not se	e your favourite	busines	s applicat	tion s	ervice listed here that you
Accounting	Digital Banking	Salary Advance					
хего	Modulr	flexear	ŕn				

#### **I.3.2 FLEXEARN CASHOUT PROCESS**

- a) Once you click 'Submit' as mentioned in Step i) of 1.3.1 FlexEarn will communicate with your employees and send them a link to download the FlexEarn app (currently only available on Android devices).
- b) Employees can then login to the app to request a salary advance of up to 50% of their accrued monthly wages. This will be automatically deducted from their monthly pay. The employee will be charged £1.50 per transaction but there is no cost to your business.
- c) For any employees who have signed up to FlexEarn and requested a salary advance, the 'Run Payroll' will download the cashouts from FlexEarn and apply the deduction in the payslip automatically as show below

PAY ADVICE - MONTHLY											
COMPANY NAME				Prev.Ref	PAYROLL N	O SUF	RNAME FORENAI	MES			
Primo Flexearn Integra					58462	Coop	er Chris				
PAYMENTS				DEDUCTIONS			SUMMARY				
DESCRIPTION	RATE	UNITS	AMOUNT	DESCRIPTION		AMOUNT	DESCRIPTION	Amoun			
Basic Pay			2,500.00	Tax Deducted		291.60	Gross For Tax	2,500.00			
				NI Contribution		213.72	Gross For NI	2,500.00			
				Salary Advance		11.50	NI Contribution Empr	245.78			

d) **Note:** when you sign up with FlexEarn you need to provide the pay date of your payroll run. If you process payroll before this date and if there has been an employee salary advance between then and the actual payroll date, you will have to rerun payroll for that employee.

New Cashout Summary										
EMPLOYEE #	FORENAMES	MOBILE NO	New cashout deducted for the employee(s) listed. Please rerun the							
58462	Chris	Cooper	+919840238104	payroll and proceed with the close period						
				DENT PG STUDENT ATTACHI N LOAN ORDER						

## **I.3.3 COMMUNICATION AND REPORTS**

- a) Once your connection to FlexEarn is authorised you can access the dashboard from the Header Menu → API (Plug Icon) → FlexEarn.
- b) Here you can submit all employees and view Balance and Cashout Summaries. You can also choose to Disconnect from FlexEarn any time.

	Submit Employees	Cashout Summary	Balance Summary	Disconnect	Close
Make every day payday with FlexEarn. FlexEarn gives your employees instant access to earnings whenever needed, not just on payday. Any advances made are t FlexEarn is free for companies with no changes to payroll or cashflows required. The service is proven to reduce employee	hen automatically deducted from e absenteeism and turnover while i	employee's payroll. ncreasing engagement a	nd satisfaction.		
Advantages: 1.0% interest. 2.No credit check required. 3. Access to mobile app. 4. Fixed £1.50* per transaction. 5. No hidden fees.					
<u>Note :</u> 1. Flexearn App is currently available only on Android devices. 2. For any queries related to Flexearn, please contact their support 'support@flexearn.com'.					

c) If you disconnect you will have the option to reconnect at any time using the same API and Secret Keys from your FlexEarn account.

Primo Flexearn Integratio (ID: 1173) 28 MAY 2019 HMRC TAX WEEK & TAX MONTH z	Joe Bloggs 🔻	<b>#</b> \$	₩?	4	Primo	Payroll
			Re-Co	onnect	Modify	Close
FlexEurn allows employees to access their wages instantly as soon as they are earned.         Advantaga1         1. % interest.         2. No credit check required.         3. Access to mobile app.         4. Fixed £1.50° per transaction.         5. No hidden fres.         6. Flexearn App is currently available only on Android devices.						

- d) From the drop-down menu on the Employees screen you can:
  - a. Notify Employees: Select individual employees to notify about FlexEarn
  - b. Submit Employees: Select individual employees to send employee data to FlexEarn
  - c. Disable Access: Select individual employees to remove their ability to request salary advances
  - d. Enable Access: Select individual employees to grant them access to request salary advances
  - e. Export Users: Exports the list of users who have signed up to FlexEarn

Primo Flexearn Integratio (ID: 1173) 28 MAY 2019 HMRC TAX WEEK 8   TAX MONTH 2 Joe Blogge 💌 🎢 🔯 🖞 ?												
En	nploye		2) - Period: 1/2019	✓ Current Er		Period Inputs •	Run Pa	ayroll Payslips	HMRC  Reports			
	PAYROLL ID	FORENAMES	SURNAME	GENDER	TAX CODE	NICATEGORY	NINUMBER	DEPARTMENT	DATE O	Your AE Stagi	Email P45 P45 Movements List	
	<u>58462</u> 58463	Chris	Cooper	Male Male	1250L	A			01/01/1	Click here to find you	End Year	
	20102	10000		T INIC	12502	~			01/01/1	Setup PAYE referen	Uplift Tax Codes	
										Setup Govt. Gatew	Bulk Email Employees Email Status Tracker	
										Add a new departm	User Activity	
										Add a new branch	Notify Employees - Flexearn	
											Submit Employee to Flexearn Disable Access to Flexearn	
											Enable Access to Flexearn Export Flexearn Users	
										Issue P45	Generate Login	

## **2** SUPPORT

We welcome any suggestions for improvement of the software. Please email to the below mentioned email.

Please email support team: <u>Support@accentra.co.uk</u> before you call. This will generate response ticket and allow our team to respond promptly. Always refer your Payroll company ID and contact details in the email.

You can call for any support to PRIMO Payroll support team Accentra Technologies Limited Warnford Court 29 Throgmorton Street London EC2N 2AT, U.K. Phone: 0845 456 7181 www.accentra.co.uk

