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# Accentra Primo Payroll – Smart Pension Setup guide v2.5



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## Signing up with Smart Pension from Primo Payroll

The Sign-up procedure for Smart Pension (direct integration) varies if the client is new or has already signed-up with Smart Pension. Follow the below steps accordingly.

New Sign-up to Smart Pension	Employer already signed-up with Smart Pension									
<b>New Sign-up to Smart Pension from Primo Payroll</b>	<b>Configure existing Smart Pension details in Primo Payroll</b>									
<p><b>A) Open the sign-up page</b></p> <ul style="list-style-type: none"> <li>Open the company in Primo Payroll</li> <li>Click <b>'Click here'</b> on the AE Panel on the right side of the home page to find the Staging date.</li> <li>Click <b>Sign-up</b> on the AE Panel on the right side of the home page</li> <li>Select 'Smart Pension' from the list and click <b>Sign-up</b>.</li> </ul> <p><b>B) Set-up the following parameters</b></p> <ul style="list-style-type: none"> <li><b>Legal Structure:</b> As relevant to the biz.</li> <li><b>Pension Calculated on:</b> "All Pensionable Earnings (Un-banded)" or "Qualifying Earnings (Banded)"</li> <li><b>Postponement:</b> As relevant</li> <li><b>Signatory:</b> Enter the details of the person in the employer organisation who will be responsible for AE compliance</li> <li><b>Admin:</b> Fill the details here (a) if you are Bureau (b) if you are an employer who have appointed a 3<sup>rd</sup> party to represent you.</li> </ul> <p><b>C) Complete the Sign-up</b></p> <ul style="list-style-type: none"> <li>Click the button Sign-up</li> <li>Wait for the successful sign-up message to appear.</li> </ul>	<p><b>A) Get the below from your Smart Pension account</b></p> <table border="1" style="width: 100%; border-collapse: collapse; margin: 10px 0;"> <thead> <tr style="background-color: #cccccc;"> <th style="width: 33%;">Bureau</th> <th style="width: 33%;">Employer under a Bureau</th> <th style="width: 33%;">Direct Employer</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;"><i>Advisor API Key</i></td> <td style="padding: 5px;"><i>Employer API Key</i></td> <td style="padding: 5px;"><i>Employer API Key</i></td> </tr> <tr> <td style="padding: 5px;"></td> <td style="padding: 5px;"><i>Employer Company ID</i></td> <td style="padding: 5px;"><i>Employer Company ID</i></td> </tr> </tbody> </table> <p><b>B) Open the Sign-up Page</b></p> <ul style="list-style-type: none"> <li>Open the relevant company (Bureau or Employer) in Primo Payroll</li> <li>Make sure the Staging date is available. For Bureau, if necessary use dummy staging date.</li> <li>Click <b>Sign-up</b> on the AE Panel on the right side of the home page</li> <li>Click the button <b>Set-up Payroll Only</b></li> </ul> <p><b>C) Input the following details</b></p> <ul style="list-style-type: none"> <li><b>For Bureau Company:</b> Advisor API Key</li> <li><b>For Employer:</b> (a) Employer API Key (b) Employer Company ID</li> </ul> <p><b>D) Complete the Payroll Set-up</b></p> <ul style="list-style-type: none"> <li>Click OK</li> <li>Wait for the successful set-up message to appear</li> </ul>	Bureau	Employer under a Bureau	Direct Employer	<i>Advisor API Key</i>	<i>Employer API Key</i>	<i>Employer API Key</i>		<i>Employer Company ID</i>	<i>Employer Company ID</i>
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	<i>Employer Company ID</i>	<i>Employer Company ID</i>								

Once the above is done, Smart Pension will send emails to the Signatory/Employer for setting up a direct debit and to accept the 'terms & conditions'. After this is done, the Smart Pension login details will be emailed to the Signatory/Employer.

**Note:** For bureau users, the bureau company should be linked to Smart Pension first followed by the client companies.

For assistance, raise a ticket by sending an email to [support@accentra.co.uk](mailto:support@accentra.co.uk) or ring us directly on 08454567181.