



ACCENTRA

PrimoPayroll

Signable

Integration User Guide

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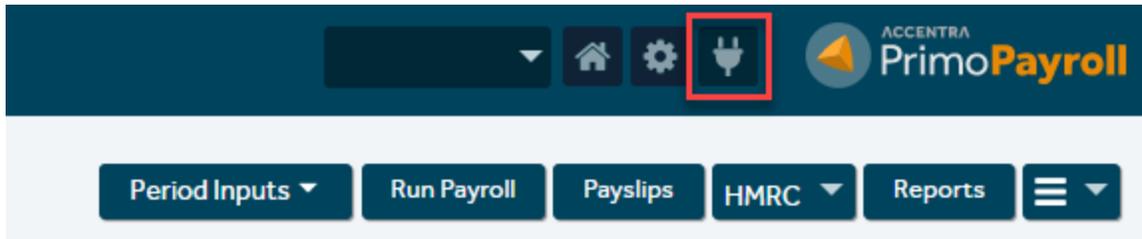
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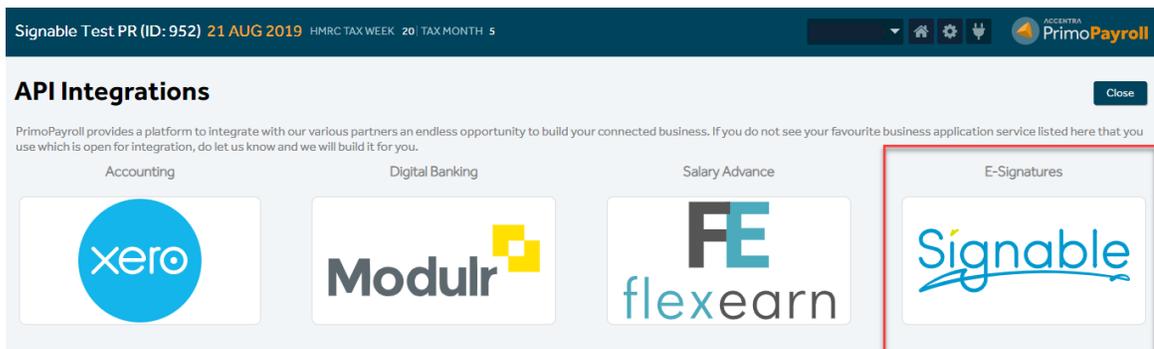
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GETTING STARTED

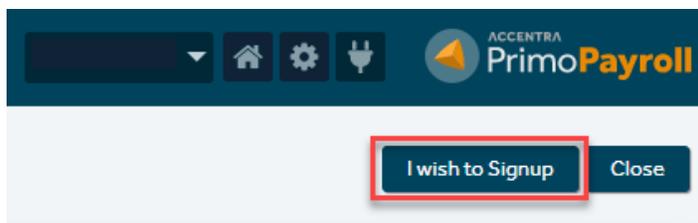
- Open the API tab in Primo Payroll by clicking on the plug icon in the top right corner of the home page



- Click on the Signable logo



- Click on the 'I wish to Signup' button



SIGNING UP

- Enter your desired Username and Email address. You will use these to log in to Signable.
- Click 'Signup'

SIGNABLE API INTEGRATION Signup

Signable account will be created based on the information given below, Please check and amend the information's if required and click Sign-up.

Once your signable account has been created, follow the below steps to login into your signable account

- Go to <https://app.signable.co.uk/login>
- Click Lost your password?
- Enter the email id and click Request a new password
- Signable will send you a reset link, Follow the link and set a password
- Login to your account to setup your templates

Company Name	<input type="text" value="Signable Test PR"/>
User's Name	<input type="text" value="Username"/> !
Email ID	<input type="text" value="Email ID"/> !

- You should now see the below message to confirm your signup has been successful
- Click on the 'Generate Password' button

Signup has been completed successfully! ✕

Notes:

- 1. Generate the password, by clicking the below button.
- 2. Create templates in Signable portal.
- 3. Download the template(s).
- 4. Map payroll fields with the template.
- 5. Send out the documents.

Generate Password

LOGGING IN TO SIGNABLE

- Enter the email address you used to signup and click the 'Request a new password' button



Simple 3-steps to recover your password

1. Enter your email address below.
2. A verification email is sent to you.
3. Click the link in the verification email.

email@example.org

Request a new password

- You will receive an email from Signable containing a link to request a new password
- Click on the link



Reset Your Lost Password, Stage 1 of 2

Unfortunately we cannot email you your original password since even we do not know what it is — that's how seriously we take your security! To reset your password please click the link below.

[Click here to have a new password emailed to you](#)

- Click on the 'Click here to login' link

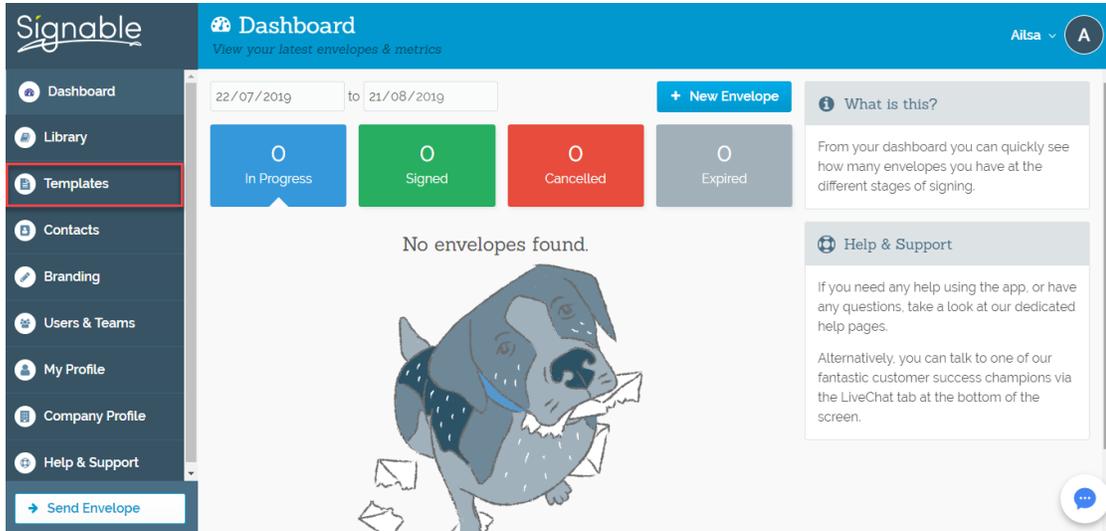


Your action has been successful

We have sent your new password to your email address. After you login, please update your password to something secure and memorable to only you.

▪ [Click here to login](#)

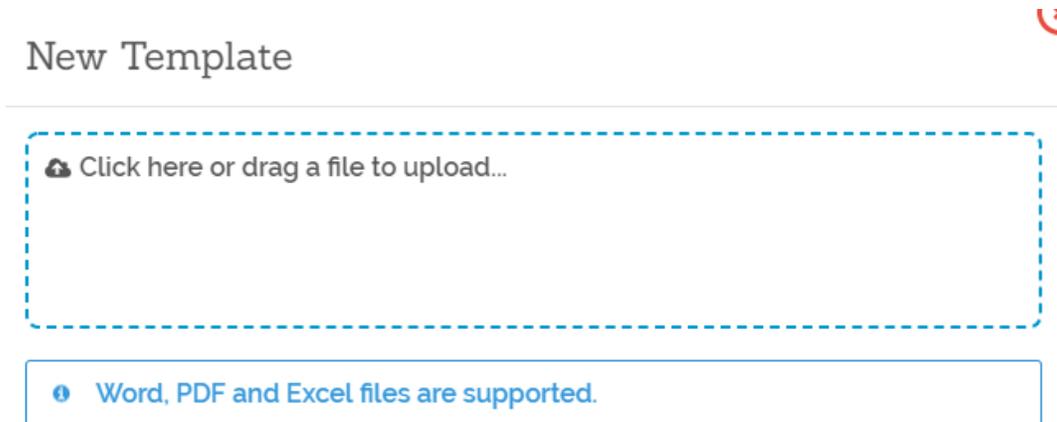
- Login to Signable using the password Signable emailed to you (you can change your password in your Signable account)
- This will open your Signable dashboard
- Click on 'Templates' in the main menu



- Click on '+ New Template' at the bottom of the screen



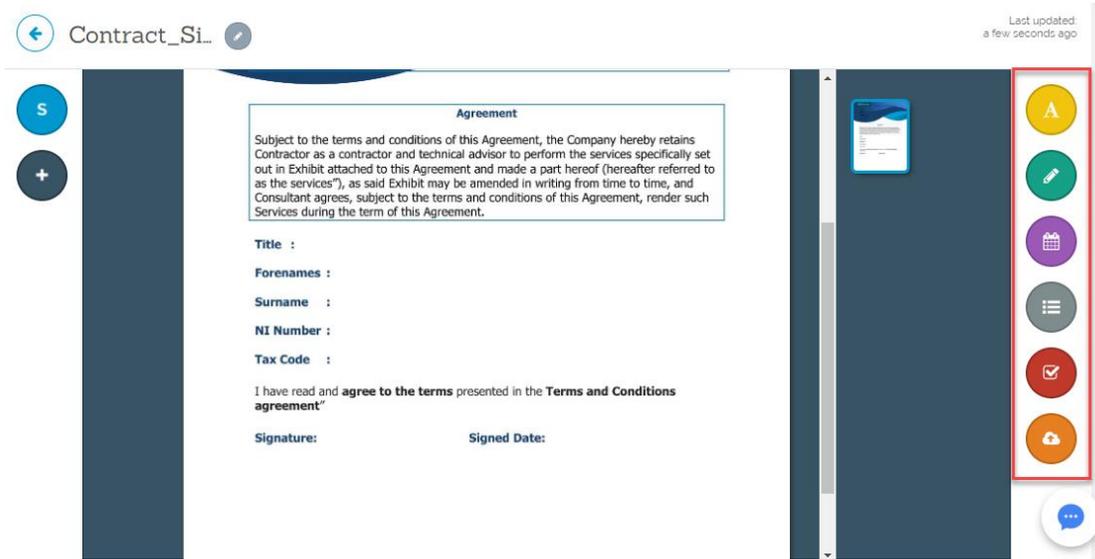
- Upload your contract document



- Your document will now show in Signable

EDITING YOUR FIRST TEMPLATE

- Use the buttons on the right side of the screen to add any required Text, Date, Dropdown, Tick Box and Signature fields to your document



- **Note:** The layout of these boxes will determine the layout of the data entered. Make sure each box is aligned correctly

Title :

Forenames :

Surname :

NI Number :

Tax Code :

I have read and **agree to the terms** presented in the **Terms and Conditions agreement**"

Signature: **Signed Date:**

- Click on each text box to assign a name and font style for the box
- Click on '+ Assign' under Merge Fields

Text Required? Yes

Title	Font	Party	Merge Fields:
Title	Arial	Signer 1	+ Assign

- Enter the relevant label for the field in the 'Add merge field...' box
- Click on the '+' icon to add the merge field to your list

Add Or Edit Merge Fields

Q

NI Number +

Surname

Forename

Title

- The new merge field will appear light blue with a check mark next to it once assigned

Add Or Edit Merge Fields

Q

+

NI Number ✔

Surname

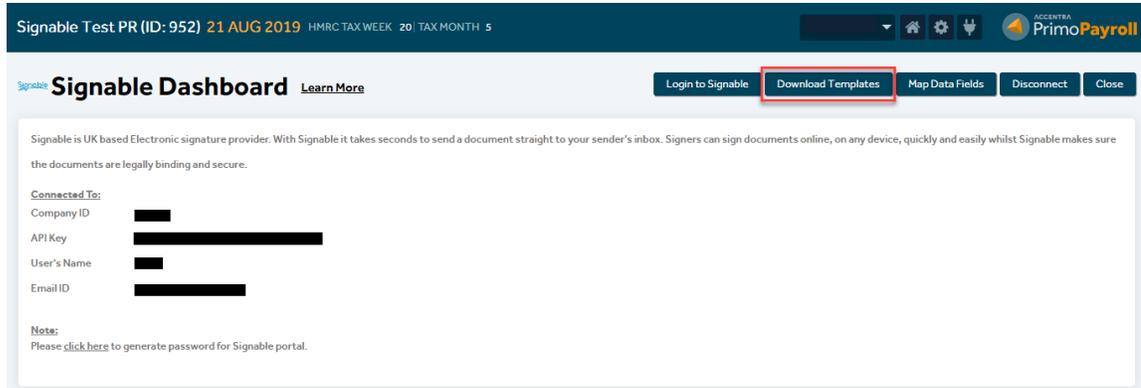
Forename

Title

- Repeat this process until all text boxes have a merge field assigned to them
- Signable will automatically save and the template is now complete
- **Note:** This entire process will need to be repeated for each individual contract if you use more than one

FINALISING SETUP IN PRIMO PAYROLL

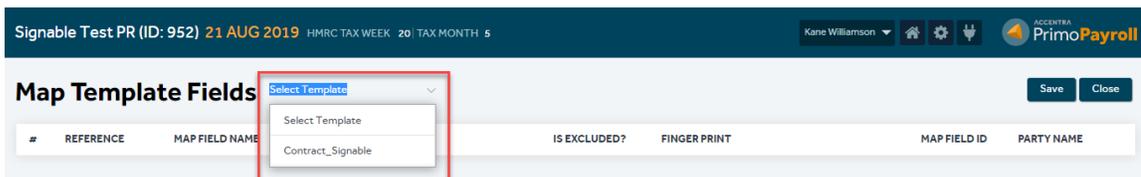
- Navigate back to the Signable API screen by clicking on the plug icon on the top right corner of the home page then clicking on the Signable logo
- You should see the below screen
- Click on 'Download Templates' to transfer the contracts you created in Signable to Primo Payroll



- Click 'Map Data Fields'



- Select the desired template from the dropdown menu



- Use the dropdown menu under 'Field Name' to select the corresponding field title.
Example – Map Field Name = Title -> Field Name = Employee Title
Map Field Name = Forename -> Field Name = Employee Forenames, etc.
- Complete this for all fields

The screenshot shows the 'Map Template Fields' interface for 'Contract_Signable'. The table lists fields with their corresponding map field names and field names. A dropdown menu is open for the 'Field Name' column, showing options like 'Employee Country', 'Employee Title', 'Company Address Line 1', etc.

REFERENCE	MAP FIELD NAME	FIELD NAME	IS EXCLUDED?	FINGER PRINT	MAP FIELD ID	PARTY NAME
8	Title	Select	<input type="checkbox"/>	88fc0f205597d872c19f398a2a765846	48860952	Signer 1
9	Forename	Employee Country	<input type="checkbox"/>	88fc0f205597d872c19f398a2a765846	48860996	Signer 1
10	Surname	Employee Title	<input type="checkbox"/>	88fc0f205597d872c19f398a2a765846	48861004	Signer 1
11	NI Number	Company Address Line 1	<input type="checkbox"/>	88fc0f205597d872c19f398a2a765846	48861020	Signer 1
12	Tax Code	Company Address Line 2	<input type="checkbox"/>	88fc0f205597d872c19f398a2a765846	48861138	Signer 1

- Select all items in the list of fields
- Click 'Save'

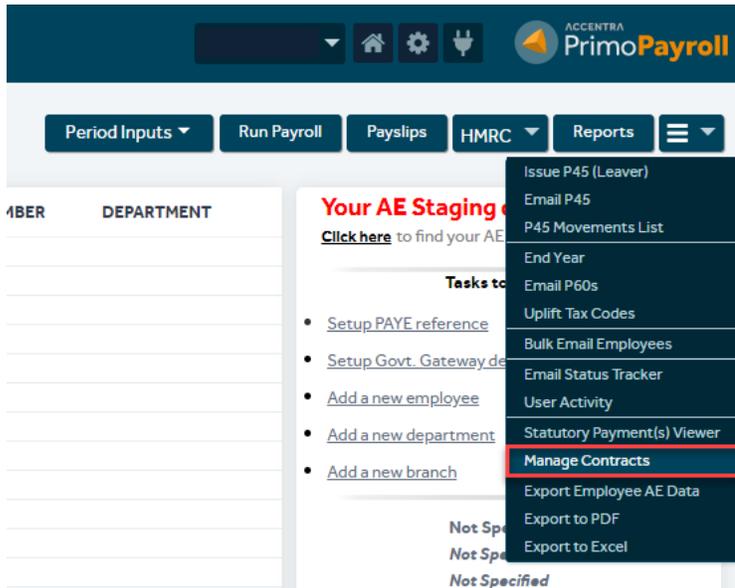
The screenshot shows the 'Map Template Fields' interface for 'Contract_Signable - COPY - COP'. The table lists fields with their corresponding map field names and field names. The 'Save' button is highlighted with a red box.

REFERENCE	MAP FIELD NAME	FIELD NAME	IS EXCLUDED?	FINGER PRINT	MAP FIELD ID	PARTY NAME
18	Title	Employee Title	<input type="checkbox"/>	93a6fc4905058d28f3f2e62c90b471f1	49032610	Signer 1
19	Forename	Employee Forenames	<input type="checkbox"/>	93a6fc4905058d28f3f2e62c90b471f1	49032611	Signer 1
20	Surname	Employee Surname	<input type="checkbox"/>	93a6fc4905058d28f3f2e62c90b471f1	49032612	Signer 1
21	NI Number	Employee NI Number	<input type="checkbox"/>	93a6fc4905058d28f3f2e62c90b471f1	49032613	Signer 1
22	Tax Code	Employee Tax Code	<input type="checkbox"/>	93a6fc4905058d28f3f2e62c90b471f1	49032614	Signer 1

- Setup is now complete and you're ready to send your contracts

MANAGING CONTRACTS

- Select 'Manage Contracts' from the dropdown menu on the right-hand side of the Primo Payroll home page



- This will open the Signable dashboard where you can track and manage contracts still to be issued and those that have been issued, signed, cancelled, expired, rejected bounced or failed.
- Click on 'To Issue'

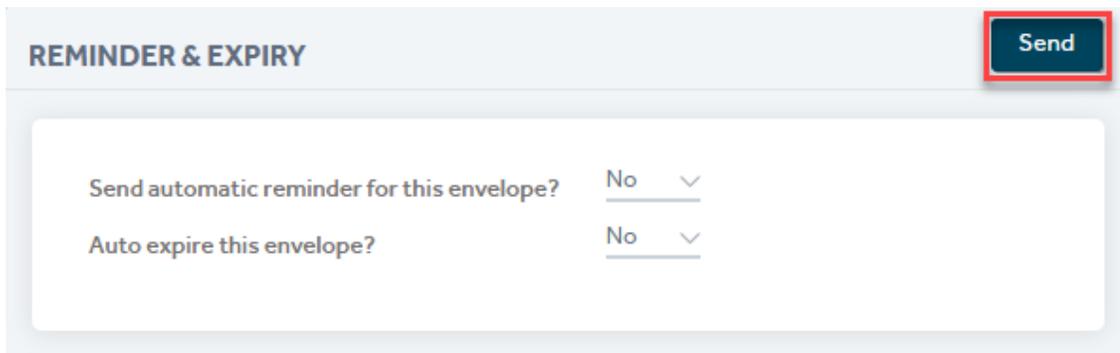
Signable Tasks: 35  Close

 To Issue 19	 Issued 2	 Signed 4
 Cancelled 4	 Expired 3	 Rejected 3
 Bounced 0	 Failed 0	

- Select all employees you wish to send contracts to (you can filter the employee list by pay frequency and contract template)
- Click on 'Send Contracts'



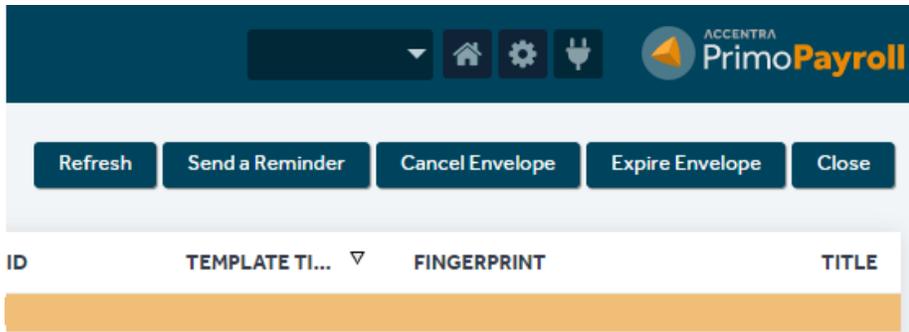
- A pop-up box will appear to give you the option to send automatic reminders or automatically expire the contract after a set time period
- Set these values if required
- Click 'Send'



- If successful, the following message will appear



- Click on 'Issued' on the Signable Tasks page to manually send a reminder, cancel or expire issued contracts
(Home Page -> Dropdown Menu -> Manage Contracts -> Issued)



- If you need to resend a contract that has been cancelled, you can do so from the 'Cancelled' section on the Signable Tasks page.
(Home Page -> Dropdown Menu -> Manage Contracts -> Cancelled)

Contracts Cancelled Monthly ▼ template 2 ▼ Search list 🔍 Resend Close

<input type="checkbox"/>	EMPLOYEE ID	FORENAMES	SURNAME	GENDER	MOBILE	EMAIL ID	TEMPLATE TITLE	FINGERPRINT
<input type="checkbox"/>	906172	Mathan	Visha	Male			template 2	38b06ebda60eff894300dd4da845
<input type="checkbox"/>	906173	Henvin	Thomas	Male			template 2	d5a7d9f071f42a1690b878f78a30
<input type="checkbox"/>	906172	Mathan	Visha	Male			template 2	3f812504cfd43cea958cb6ade5d

SUPPORT

If you have any questions or are experiencing any issues with the software please email the support team at support@accentra.co.uk before you call. This will generate a support ticket and allow our team to respond promptly. Please include your Payroll company ID and contact details in the email.

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