

Accentra Primo Umbrella

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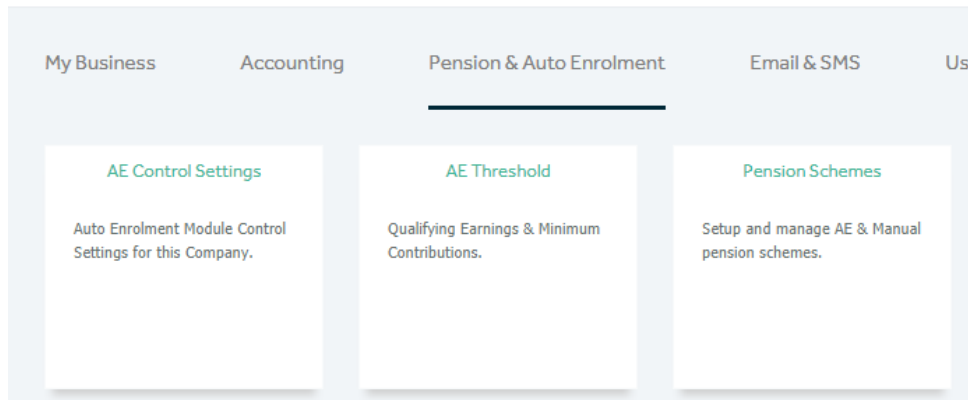
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I ENHANCEMENTS

I.1 AUTO-ENROLMENT SETTINGS CHANGES

We've shuffled some sections around in the Company Settings screen. The Auto Enrolment tab has been renamed 'Pension & Auto Enrolment' and the Pension Schemes section has been moved here (previously it was found in Company Settings -> Accounting -> Accounting & Payroll).

Company Settings



I.2 SENDING CC EMAILS

It's now possible to add a CC email address to emails sent from Primo Umbrella. You can add multiple email addresses in this field, up to a maximum of 150 characters.

Company Settings -> Email & SMS -> Email Templates -> Description -> Mail Settings

Mail Settings

ID	Is Active?	Description	Dynamic Sender Email ID?
REM-VAT	Yes	VAT Reminder	Yes
Sender Email	CC Email	Email Subject	
tba@tba.com	tba@tba.com	VAT Reminder	

I.3 EMAIL TEMPLATE – EMPLOYEE NAMES (NEW REQUIREMENT 4758)

You can now customise the way you want to send emails to contractors. You're able to insert contractor forenames ([EmployeeForenames]) and surnames ([EmployeeSurname]) separately into an email template, rather than their full name ([EmployeeName]) every time.

Employee Name	[EmployeeName]
Employee Forenames	[EmployeeForenames]
Employee Surname	[EmployeeSurname]

1.4 NEW PAYMENT FILE FORMAT

We've added Lloyds Link Online Faster Payments as a payment provider option when generating a payment file.

Task Manager -> Payroll Tasks -> Generate Payment File

GENERATE PAYMENT FILE


Create File

Cancel

PAYMENT PROVIDER

LloydsLink Online Faster Pay ▾

DATE OF PAYMENT

27/11/2019 

NEXT DAY PAYMENT

I.5 RUN PAYROLL & CONFIRM PAYMENT – AGENCY FILTER

When running payroll and confirming contractor payments, you can now filter the contractor list by agency.

Task Manager -> Payroll Tasks -> Run Payroll/Confirm Contractor Payment

Run Payroll

Export

Close

Employees To Process

All Agencies

Weekly

EMPLOYEE ID

From

To

Refresh

	EMPLOYEE ID	FORENAMES	SURNAME	FREQUENCY	TAX PERIOD	NET PAY	PAYMENT MADE	DUE	LOCKED?
<input type="checkbox"/>									

CONFIRM CONTRACTOR PAYMENT

Confirm Payment

Cancel Payment

Export

Close

☐

LOCK EMPLOYEES ON PAYMENT CONFIRMATION

PAYMENT METHOD

ALL

PAY FREQUENCY

ALL

☐

SEND SMS?

SMS MESSAGE

Salary Paid: [Amount]

NUMBER OF CHARACTERS -21

AGENCY

All Agencies

	ID	P11 ID	EMPLOYEE ID	FORENAMES	SURNAME	AMOUNT	SYSTEM ID	STATUS	ACTION
<input checked="" type="checkbox"/>	8628	17633	50001	TEST	Zennal	877.81	30682		
<input checked="" type="checkbox"/>	8629	17634	50002	TEST	Ervaen	968.35	30683		
						1,846.16			

I.6 CONTRACTOR LIST FILTER

You can now filter your contractor list by their current status: Active or Inactive.

The screenshot shows the 'Contractors' section of the Accentra Primo Umbrella portal. At the top, there is a header with the title 'Contractors', a plus icon in a circle, and a filter dropdown set to 'Weekly (5) - Period: 1/2019'. Below this is a table with columns: ACTION, EMPLOYEE ID, and FOR. The table contains five rows of contractor data. A dropdown menu is open over the table, showing filter options: Leavers, Awaiting Contract, Unlocked, Locked, On Hold, Active, and Inactive. The 'Active' and 'Inactive' options are highlighted with a red box.

ACTION	EMPLOYEE ID	FOR
<input type="checkbox"/> [Icons]	50011	TES
<input type="checkbox"/> [Icons]	50010	TES
<input type="checkbox"/> [Icons]	50006	TES
<input type="checkbox"/> [Icons]	50002	TES
<input type="checkbox"/> [Icons]	50001	GRO

Note: As there have been few design changes on the portal, please press (Ctrl + Shift + R) to update your cache to the latest version when you login to the portal if you're experiencing continuous loading/freezing issues.

SUPPORT

We welcome any suggestions for improvements to the software. Please send an email to the below mentioned email address if you have any feedback or suggestions.

If you 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.

Primo Umbrella Support Team

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