

Accentra Primo Umbrella

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I ENHANCEMENTS

I.1 PAYMENT RATE - NAME CHANGE

The payment rate type “Fixed Additions & Deductions Only” has been changed to “Payment Only Rate”.

I.2 AGENCY RECORD – INVOICE TAB



An ‘Invoice’ tab has been added to agency records where you can view all the invoices belonging to that specific agency.

Menu -> Agencies -> View -> Invoice

Agency 01 - 977328 New Assignment Close

Main	Timesheets awaiting Invoicing	Assignments	Timesheets	Sites	Invoice
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ACTION	INVOICE REF	INVOICED DATE	TAX PERIOD	NET AMOUNT	VAT AMOUNT	TOTAL AMOUNT	DUE	MARGIN	RECEIPT	PER
 	INV100001	09/07/2019	14/2019	1,200.00	240.00	1,440.00	0.00	0.00	1,440.00	14/2
				1,200.00	240.00	1,440.00	0.00	0.00	1,440.00	

I.3 VAT MILEAGE CLAIM

Primo Umbrella will now keep a running total of how many business miles have been claimed by each contractor in the year to date. The payment rate will automatically change once the 10,000 mile threshold has been met:

- Up to 10,000 miles: 45p/mile
- 10,000+ = 25p/mile

I.4 CIS CONTRACTOR IMPORT

For contractors in the Construction Industry who operate through their own limited company, we’ve added the following fields to the CIS contractor import template:

- Company Name
- Company Type
- Company Registration Number

I.5 AE SUBMISSION ERROR MESSAGE

Employee ID numbers will now show in any Auto Enrolment submission error message/status message, making it easier to identify the affected contractor.

I.6 reCAPTCHA

The latest version of reCAPTCHA (V3) has been implemented on the Primo Umbrella login page. This is an upgraded version which is invisible so the reCAPTCHA module will not show on the login page.

1.7 CONTRACTOR RECORD – JOB DESCRIPTION

A new section has been added to the contractor record to allow you to enter their job description.

Menu -> Contractors -> Employee ID -> Employment -> Job Description

Employment

Agency Ref	Previous Payroll Number	Is Apprentice?	
1236	To Be Specified	No	
Status	On Hold?	Registration Status	
Active	No	New Contractor	
AML Completed?	Reason for issuing P45		
No	Select a reason		
Date of Joining	Date Left	Start Period	Last Paid Period
09/07/2018	To Be Specified	14	0
Pay Frequency	Work Pattern	Payment Method	
Weekly	All Weekdays	BACS	
Annual Basic	Hours/Week	Hourly Rate	Job Description
0.00	35.00	0.00	To Be Specified
Branch	Department	Job Category	

1.8 EXPENSES – RESTRICTION FACILITY

You're now able to flag contractors as ineligible for claiming expenses. For all such contractors, no expenses will be allowed to be created or shown.

Menu -> Contractors -> Employee ID -> Umbrella -> Payment Rules -> Expense Claim Rule

Payment Rules

Primary Agency	Salary Payment Term	Holiday Pay Method	Margin Method
Select	Proportional to Cash Receipt	Calculate & Pay	Follow Agency Rule
Margin Deduction	Expense Claim Rule	Sales Staff	Customer Service Staff
0.00	Disallow	Select	Select
Agency Consultant			
Select			

Save
Cancel

I.9 CONTRACTOR LIST – LAST PAID DATE

You can now see the last paid date in the contractor list screen.

Contractors Weekly (8) - Period: 9/2017 Print Import HMRC Forms Print P45 AE Close

All

NI NUMBER	DOB	JOINING DATE	LEAVING DATE	LAST PAID DATE	VISA EXPIRY DATE	FREQUENCY	DIRECTOR?	TAX CODE	AE CATEGORY
	04/05/1966	04/05/2018	04/05/2018			Weekly	No	1050L*	Not Yet Assessed
	20/12/1995	26/02/2018				Weekly	No	1150L*	Not Yet Assessed
	18/12/1989	18/12/2017				Weekly	No	1150L*	Not Yet Assessed
AA123123B	15/09/1988	10/08/2017		05/12/2017		Weekly	No	1060L*	Not Yet Assessed
AA123123B	24/08/1974	10/08/2017		05/12/2017		Weekly	No	1060L*	Not Yet Assessed
AA123123B	14/05/1982	10/08/2017		05/12/2017		Weekly	No	1060L*	Not Yet Assessed
AA123123B	18/06/1985	10/08/2017		05/12/2017		Weekly	No	1060L*	Not Yet Assessed
AA123123B	23/11/1975	10/08/2017		05/12/2017		Weekly	No	1060L*	Not Yet Assessed

I.10 VAT RATE CALCULATION BY SITE

The system will now automatically recognise the Site ID in timesheets and use the relevant VAT rate associated with that site in subsequent calculations.

I.11 PRINT PAYSLEIPS

You now have the option to view a preview of the payslips to be printed before sending them to the printer.

Payroll Control Report Print Criteria

Weekly Tax Period 2 Tax Year 2019 All Email Items All SMS Items

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	EMP. ID	AGENCY REF	FORENAMES	SURNAME	TOTAL PAYMENTS
<input type="checkbox"/>	50056	33642	Peter	Frost	450.71
<input type="checkbox"/>	50055	33641	Jack	Frost	462.84
<input type="checkbox"/>	50042	OPT4995	Anne	Rampling	472.68
<input type="checkbox"/>	50041	OPT4884	Kylie	Butler	274.96
<input type="checkbox"/>	50040	OPT4773	Pippa	Sharp	274.96
<input type="checkbox"/>	50039	OPT4662	Boris	Martin	169.52
<input type="checkbox"/>	50038	OPT4551	Nicholas	Sharp	160.00
<input type="checkbox"/>	50037	OPT4440	Melanie	Kerr	201.15

Reconcile Payroll

Payroll Summary Report

Email Pay advice to Contractors (Selected Items)

Bulk Email Pay advice to Agency

Save to Disc (Bulk)

Print Payslips

Send SMS

Initialise Payslip Data

I.12 TIMESHEETS AWAITING INVOICING

We've added two new columns: Employee ID and Agency name, to the Timesheets Awaiting Invoicing list screen.

Menu -> Timesheets & Expenses -> Timesheets Awaiting Invoicing

Timesheets Awaiting Invoicing

Print

Close

CONTRACTORS: 1

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TS ID	BATCH ID	DATE	AGENCY NAME	EMPLOYEE ID	FORENAMES	SURNAME	WEEK END DATE	NET AMOU	VAT AMOU	TOTAL AMOU	SITE
95	0	17/06/2017	Client (975295)	211	PRabu	Siva	17/06/2017	100.00	20.00	120.00	-
								100.00	20.00	120.00	

I.13 EMAILING PAYSLEIPS

Payslips can now be emailed as soon as they have been generated; you don't have to confirm payments first.

I.14 APPRENTICES

There's now a section in the contractor record to indicate whether or not a contractor is an apprentice.

Menu -> Contractors -> Employee ID -> Employment -> Is Apprentice?

Employment

Agency Ref 1232	Previous Payroll Number To Be Specified	Is Apprentice? Yes	
Status Active	On Hold? No	Registration Status New Contractor	
AML Completed? No	Reason for issuing P45 Select a reason		
Date of Joining 18/12/2017	Date Left To Be Specified	Start Period 9	Last Paid Period 0
Pay Frequency Weekly	Work Pattern All Weekdays	Payment Method BACS	
Annual Basic 0.00	Hours/Week 35.00	Hourly Rate 0.00	Job Description To Be Specified
Branch	Department	Job Category	

I.15 GENERATE DOCUMENTS TO AGENCIES

Instead of having to send documents to all contractors within an agency, you can now select specific contractors from a dropdown to add to the Recipient List. The dropdown list will appear when you enter the Agency ID number range in the 'To' and 'From' fields and click the 'Load List' button. If you want to send the document to selected contractors from one agency only, enter the same Agency ID in both the 'To' and 'From' fields.

Menu -> Tools -> Generate Document to Agencies

Generate Document to Agencies Email Doc. Close

Email Design: Select

Recipient Type: Agency

Agency ID: 977328 To 977328 Load List

Contractors: Select Contractor

Select Contractor

John Michel - 50001

Recipient List

<input checked="" type="checkbox"/>	ID	NAME	EMAIL
<input checked="" type="checkbox"/>	977328	Agency 01	

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Document List + Change Delete

No data to paginate < >

<input type="checkbox"/>	DOCUMENT NAME

I.16 POST CODE VALIDATION

When you type in a post code, the system will automatically verify it and populate the address fields once you choose the correct address from the given list.

Contact Details

Address Line 1: 123

Address Line 2: To Be Specified

City: To Be Specified

County/State: To Be Specified

Communication Method: Select

Email ID: tba@tba.com

Post Code: IG3 9E

The Ignatian Spirituality Centre, 35 Scott Street Glasgow
 The Ignham Club, Sevenoaks Road, Ignham, Sevenoaks
 La Iguanas, 1 John Street Harrogate
 Iyoga Unit 1 Windsor House Battersea Road Stockport
 Iueg Ltd Unit 8 Maple Grove Business Centre Lawrence Road Hounslow
 Ioughton Community Gymnastics C1 C Casablanca, 408 Oakwood Hill Industrial Estate Oakwood Hill Ioughton
 Iogen Ltd Unit 10 Melbourne Business Court Pride Park Derby
 Iogymco Forge Garage High Street Great Oakley Harwich
 Iyftl 247 Gym Highbank Porlock Minehead
 Iygb Ltd 24A Proctor Street Birmingham
 Iguzzini Lighting, 4 Berkeley Street Glasgow
 Iguzzini Illuminazione UK Ltd, The Astolat Business Park Astolat Way Peasmarsh Guildford
 Iguzzini Illuminazione Ltd Business Design Centre 52 Upper Street London N1
 Igus (UK) Ltd, 51A Caswell Road Brackmills Industrial Estate Northampton
 Iguzzu World Furniture, 100-104 High Road Beeston Nottingham

Country: GB

Mobile Number: 7480510853

Login ID: To Be Specified

Save Cancel

INCLUDE IN CURRENT FPS? ☐

PASSPORT N

I.17 ADVANCED UMBRELLA PAY CALCULATOR

We've added the following drop down fields to the Advanced Umbrella Pay Calculator:

- Deduct Apprentice Levy?
- Holiday Pay Retention Method
- Holiday Pay Method
- Deduct Student Loan?
- Deduct PG Student Loan?

Menu -> Tools -> Advanced Umbrella Pay Calculator

Advanced Umbrella Pay Calculator

Calculate Print Send Mail Close

Pay Frequency	Weekly	Pay Rate/Hour	0.00	Holiday Pay Method	Calculate & Pay
Tax Code		Standard Hours/Period		0.00	Holiday Pay Retention Method
NI Category	Category A	Average Miles/Period		0.00	Deduct Student Loan?
Processing Fee		Subsistence etc./Period	0.00		Deduct PG Student Loan?
Email ID		Deduct Apprentice Levy?	No		

I.18 CONTRACTOR LIST- AE ENHANCEMENT

When opting contractors out of their pension scheme from the contractor list, the below pop-up will appear. Here you can enter the opt-out date, choose whether or not to refund any contributions to date, attach any relevant supporting documents and enter a reference number or message.

OPTOUT-CONTRACTORS

Opt-Out Close

Your company is integrated with the pension provider. The program will automatically download the 'Opted-out' Employees from the pension portal when the 'Run Payroll' is done. Use this option only if you wish to manually Opt-out an employee who is contributing pension.

Date !

Process Optout

☐ With Refund
 ☐ With-out Refund !

Browse...

Allowed file types: jpg, png Maximum file size: 4MB

Reference Number !

1.19 TIME SHEET IMPORT

Period Start Date and Period End Date columns have been added to the timesheet import template. These are not mandatory fields. If the dates are complete in the import file, the system will read these dates and ignore the week-ending date entered in Primo Umbrella. If there are no dates in the import file, the system will use the week-ending date entered in Primo Umbrella.

Task Manager -> Import Timesheets

Bulk Import Timesheets BATCH NO 0

Download Master Template Export Pre-Process Import Now Close

AGENCY
Select Agency

TEMPLATE

WEEK-ENDING DATE

IMPORT FILE NAME

WORKSHEET NAME
Load Data

1.20 NON-PAYE CONTROL REPORT

We've made improvements to the Non-PAYE Control Report, so it loads much quicker, even when producing data for multiple weeks.

1.21 RE-SEND LOGIN DETAILS

You're now able to re-send login details to any user from the user list screen.

Settings -> Users -> User List

All Users +

User Groups All Records Admin User? No

All Active Inactive

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USER #	DETAILS	LOGIN ID
1256 Active	Tba Tbatba User Group: PSC Email ID: Tba@Tba.Com Company ID: 11525 Is Admin User?: No View Edit Delete Activate User Send Login Lock Account	Tbatba1256

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.

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