Accentra Primo Umbrella September 2019 Release Notes v1.0.6688

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I ENHANCEMENTS

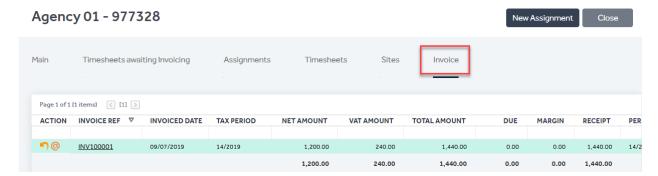
I.I PAYMENT RATE - NAME CHANGE

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

1.2 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



1.3 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

1.4 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

1.5 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.

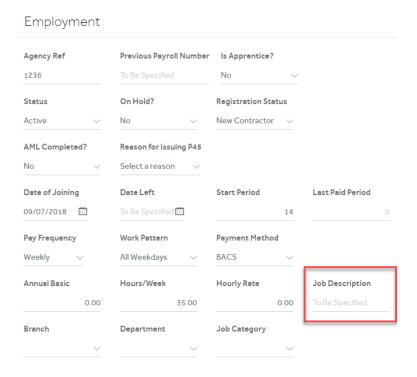
I.6 RECAPTCHA

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.

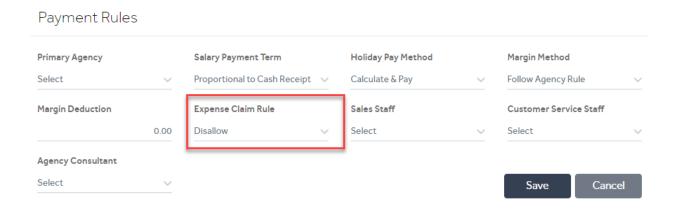
Menu -> Contractors -> Employee ID -> Employment -> Job Description



1.8 EXPENSES – RESTRICTION FACILITY

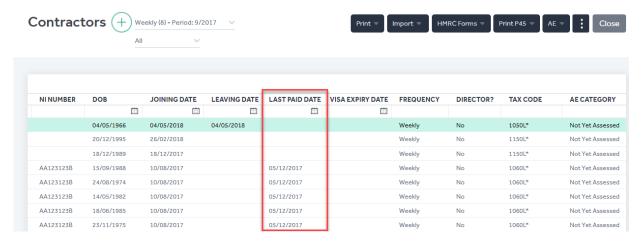
You're now able to flag contractors as ineligible for claiming expenses. For all such contractors, no expenses will be allowed to be created or shown.

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



1.9 CONTRACTOR LIST – LAST PAID DATE

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

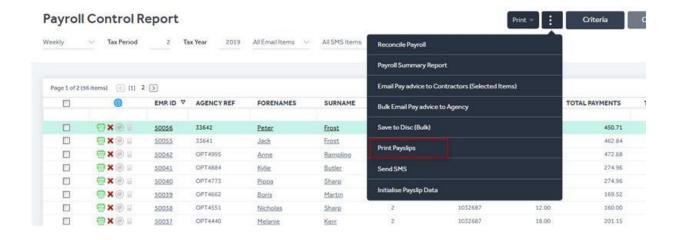


1.10 VAT RATE CALCULATION BY SITE

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.II PRINT PAYSLIPS

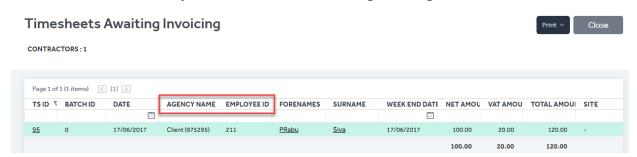
You now have the option to view a preview of the payslips to be printed before sending them to the printer.



1.12 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



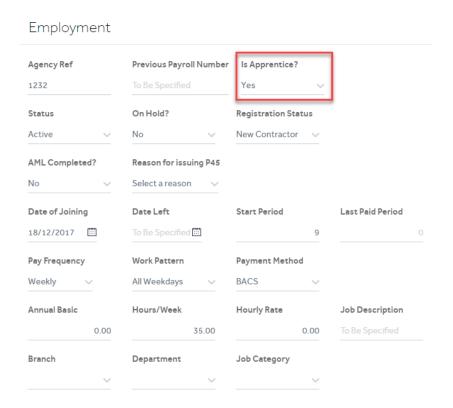
1.13 EMAILING PAYSLIPS

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

1.14 APPRENTICES

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

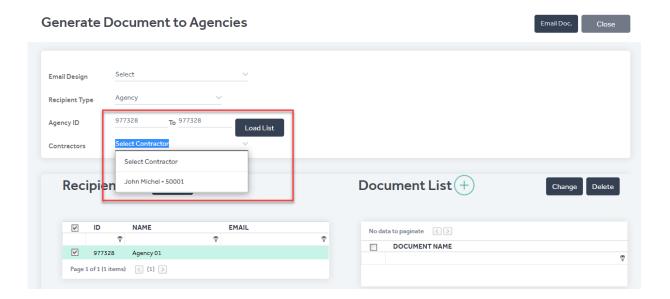
Menu -> Contractors -> Employee ID -> Employment -> Is Apprentice?



1.15 GENERATE DOCUMENTS TO AGENCIES

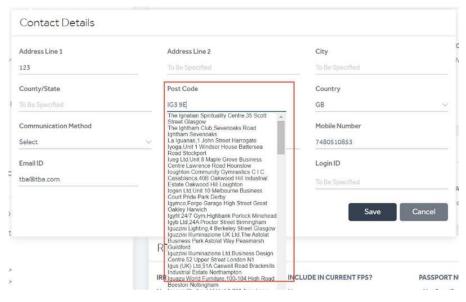
Instead of having to send documents to all contractors within an agency, you can now select specific contractors from a dropdown to add to the Recipient List. The dropdown list will appear when you enter the Agency ID number range in the 'To' and 'From' fields and click the 'Load List' button. If you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



1.16 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.



1.17 ADVANCED UMBRELLA PAY CALCULATOR

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

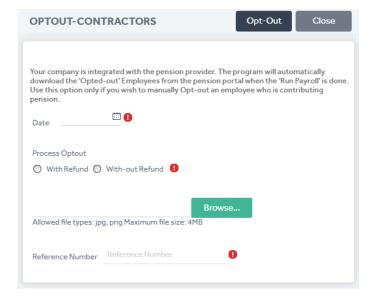
- Deduct Apprentice Levy?
- Holiday Pay Retention Method
- Holiday Pay Method
- Deduct Student Loan?
- Deduct PG Student Loan?

Menu -> Tools -> Advanced Umbrella Pay Calculator



1.18 CONTRACTOR LIST- AE ENHANCEMENT

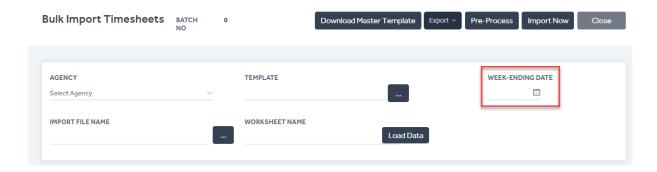
When opting contractors out of their pension scheme from the contractor list, the below pop-up will appear. Here you can enter the opt-out date, choose whether or not to refund any contributions to date, attach any relevant supporting documents and enter a reference number or message.



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 weekending date entered in Primo Umbrella. If there are no dates in the import file, the system will use the weekending date entered in Primo Umbrella.

Task Manager -> Import Timesheets



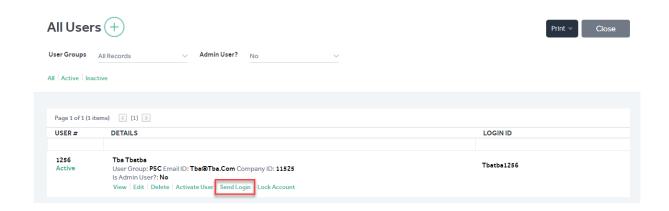
1.20 NON-PAYE CONTROL REPORT

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



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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