

Accentra Primo Umbrella

December 2020 Release Notes v1.0.8292



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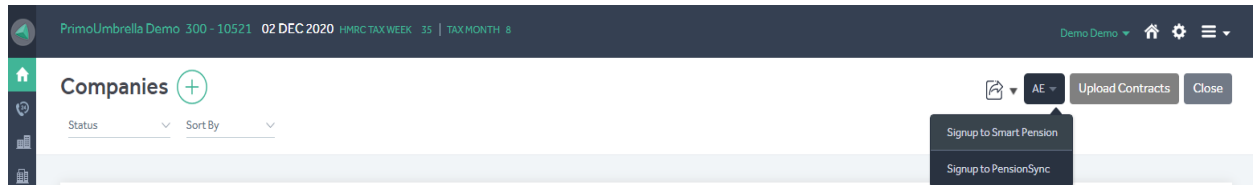
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I ENHANCEMENTS

I.1 Pension Provider Sign-up: Multi-Company Interface

The feature to sign-up from the multi-company interface is available. The user needs to first sign-up to Smart Pension or PensionSync and then configure the pension settings. From the 'Companies' screen click the AE dropdown and select the provider.

Multi Company Interface → Companies Screen → AE dropdown



I.2 Agency Record

The Agency record has been restructured to provide more clarity on the functions available and what they relate to. 'Financials' and 'Contractor' sections are now separated to provide a better overview.

Financials

| | | |
|---|--|----------------------------------|
| CURRENCY Pound (GBP) | VAT RATE Standard 20.00% | VAT.REG NO. 25486765 |
| INVOICING METHOD Consolidate by Batch | PAYMENT DAYS 0 | CREDIT LIMIT £0.00 |
| COMM.METHOD Email | INVOICING EMAIL demo.invoice.payslip@... | CC EMAIL Not Specified |
| BANK ACCOUNT NUMBER 70043888 | BANK SORTCODE 000000 | |

Contractor Payment

| | |
|--|------------------------------|
| MARGIN METHOD Apply Fixed Fee | MARGIN £12.00 |
| HOLIDAY PAY METHOD No Holiday Pay - Retained by the Agency | HOLIDAY RATE 0.00% |

1.3 CIS Verification

We've added the 'Reverify Days' field which will allow you to easily keep track and re-verify your contractor's Personal Verification Number (PVN). Reverification will be done after the period you specify in the 'Payroll Scheme' settings.

Company Settings → Payroll → Payroll scheme → Preferences section → Reverify Days

Payroll Scheme

Payroll Scheme Settings

Payroll Type: Self-Employed
Payroll Scheme: CIS

Preferences

Password Protect documents emailed to contractors? Yes
Password Rule: NI Number
AML Compliance Rule: No Restrictions

Allow Expenses for Self-Employed Payroll Scheme? No

Reverify Days: 60

Task Manager – CIS Verification Tab

A new 'CIS Verification' tab has been added in the Task Manager. You can now track and complete verification tasks from a single screen.

Task Manager

Payroll HMRC Accounting **CIS Verification**

Verification Data Missing 1 Due Send

Match Personal Verification Number 1 Due Match

Verify Contractor Status 0 Due Verify

Reverify Contractor Status 84 Due Track

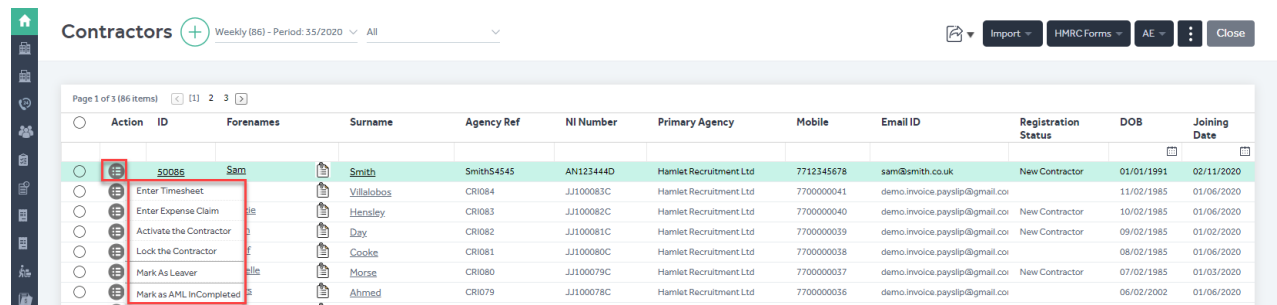
Send Personal Verification Number 84 Due Send

- **Verification Data Missing:** To track and send a reminder to contractors regarding missing information.
- **Match Personal Verification Number:** To send a request to HMRC to match the PVN provided by the contractor.
- **Verify Contractor Status** – To verify the contractors who do not have a PVN.
- **Re-verify Contractor Status** – To re-verify contractor status with HMRC when the reverification period has passed.
- **Send Personal Verification Number** – To email the PVN to the contractors.

I.4 User Interface Updates

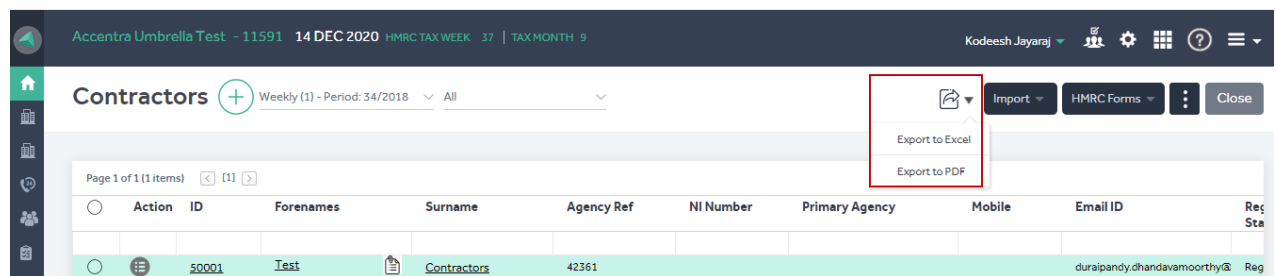
Contractor List

All the 'Action' features which were previously shown as icons have been moved in to a dropdown menu.



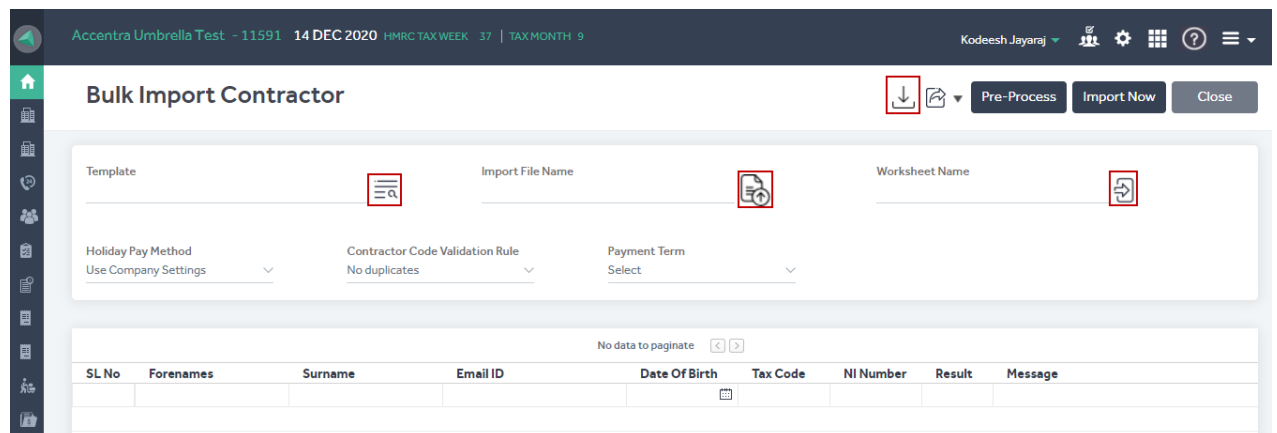
Export

The export icon has been changed as below. The user can click the export dropdown and select the required export option.



Import Screens

The buttons in the 'Import' screen has been changed to icons. Moving the cursor on top of the icon will show the text description of that icon.



All Listing Screens

As part of the UI enhancements, general changes have been done across all listing screens. The changes include Fonts, Column Names, and Alignment etc.

HMRC Tab

The 'HMRC' section of the Task Manager has been redesigned to provide a clearer and more engaging user experience.

Task Manager Default Payroll Frequency: Weekly Current Period: 35

The screenshot shows the HMRC Tab selected in the Task Manager. The interface displays a grid of task cards for various HMRC submissions and notifications. Each card includes a title, a 'Due' date (all showing '0 Due'), and action buttons like 'Submit', 'History', 'Apply', and 'Download'.

| Task Card | Due Date | Action Buttons |
|-------------------------------|----------|-----------------|
| FPS Submission | 0 Due | Submit, History |
| EPS Submission | 0 Due | Submit, History |
| EYU Submission | 0 Due | Submit |
| P6/P9 Notifications | 0 Due | Apply, Download |
| NI Number Verification | 0 Due | Apply, Download |
| Student Loan Notifications | 0 Due | Apply, Download |
| PG Student Loan Notifications | 0 Due | Apply, Download |

Auto Enrolment

The 'Auto Enrolment' section of the Task Manager has been redesigned to provide a clearer sign-up flow and more engaging user experience.

Task Manager Default Payroll Frequency: Weekly Current Period: 35

The screenshot shows the Auto Enrolment section of the Task Manager. It features a 'Signup Process' flowchart with four steps: 1. STAGING DATE, 2. PENSION SCHEME, 3. CONFIRM SCHEME SIGN-UP, and 4. COMPLIANCE DECLARATION. Below the flowchart, there are two sections: 'Ongoing Process' and 'Completed'. The 'Ongoing Process' section contains cards for 'Missing membership ids', 'Data Submission Errors', 'Assessment Communication', 'Postponement Communication', and 'Re-enrollment'.

Signup Process

- 1 STAGING DATE**: Staging Date 01/06/2020
- 2 PENSION SCHEME**: Pension Scheme Signed-up to Smart Pension
- 3 CONFIRM SCHEME SIGN-UP**: Confirm Scheme sign-up Scheme Setup successfully
- 4 COMPLIANCE DECLARATION**: Compliance Declaration Pending [Complete](#)

Ongoing Process

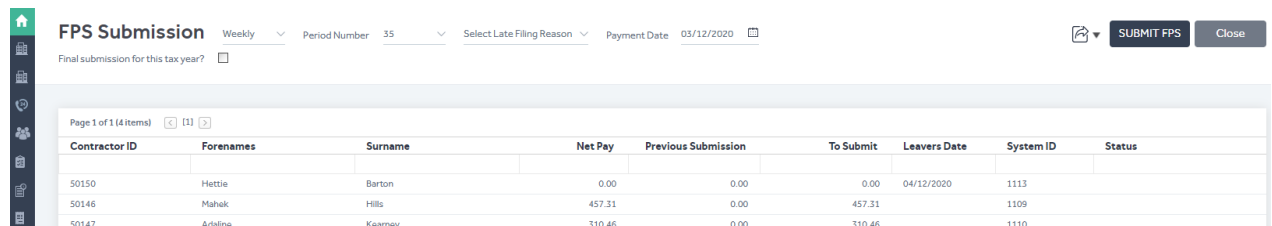
| Task Card | Due Date | Action Buttons |
|----------------------------|-----------|--------------------|
| Missing membership ids | 0 Due | View Missing IDs |
| Data Submission Errors | 0 Due | Submit |
| Assessment Communication | 0 Due | Send Communication |
| Postponement Communication | 0 Due | Send Communication |
| Re-enrollment | Completed | |

1.5 HMRC Notifications: Multi-Company Interface

We've now included P6/P9, Student loan & Postgraduate loan notifications download features (which was previously available only from the Multi-Company Interface) within the 'HMRC Tasks' section of the individual payroll companies.

1.6 FPS Submission Screen

The FPS Submission screen has been modified to increase its performance. The 'Leaving Date' column has also been included in the screen.



FPS Submission Weekly Period Number 35 Select Late Filing Reason Payment Date 03/12/2020

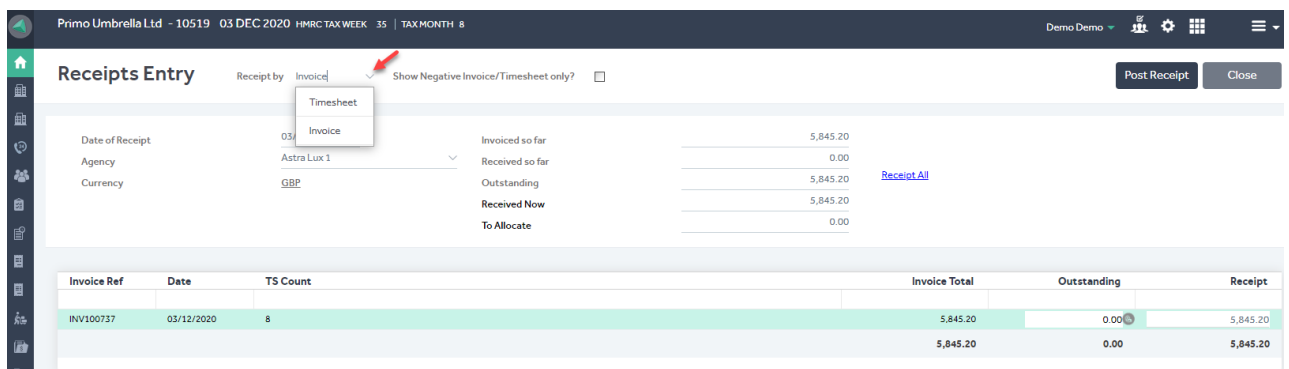
Final submission for this tax year? ☐

Page 1 of 1 (4 items)

| Contractor ID | Forenames | Surname | Net Pay | Previous Submission | To Submit | Leavers Date | System ID | Status |
|---------------|-----------|---------|---------|---------------------|-----------|--------------|-----------|--------|
| 50150 | Hettie | Barton | 0.00 | 0.00 | 0.00 | 04/12/2020 | 1113 | |
| 50146 | Mahak | Hills | 457.31 | 0.00 | 457.31 | | 1109 | |
| 50147 | Adaline | Kearney | 310.46 | 0.00 | 310.46 | | 1110 | |

1.7 Manual Receipt Allocation – Filter

The user can now filter the receipts by 'Invoice' and 'Timesheet'. Also, an option to view only the negative invoices/timesheet is now available.



Receipts Entry Receipt by Invoice Timesheet Show Negative Invoice/Timesheet only? ☐

Date of Receipt 03/12/2020 Agency Astra Lux 1 Currency GBP

Invoiced so far 5,845.20 Received so far 0.00 Outstanding 5,845.20 Received Now 5,845.20 To Allocate 0.00

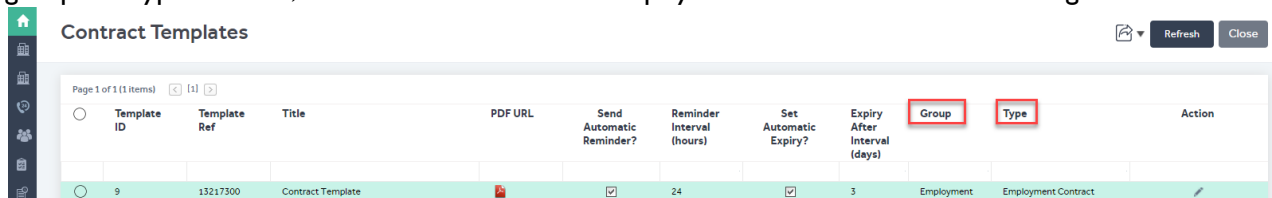
[Receipt All](#)

| Invoice Ref | Date | TS Count | Invoice Total | Outstanding | Receipt |
|-------------|------------|----------|---------------|-------------|----------|
| INV100737 | 03/12/2020 | 8 | 5,845.20 | 0.00 | 5,845.20 |
| | | | 5,845.20 | 0.00 | 5,845.20 |

1.8 Signable Integration – Enhancements

(Applies only to users integrated with Signable)

Contract Template: Two new fields have been added in the Signable Contract Template. Based on the group and type selected, the contracts will also be displayed in the new 'Document Manager' feature.



Contract Templates Refresh Close






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| Template ID | Template Ref | Title | PDF URL | Send Automatic Reminder? | Reminder Interval (hours) | Set Automatic Expiry? | Expiry After Interval (days) | Group | Type | Action |
|-------------|--------------|-------------------|---------|-------------------------------------|---------------------------|-------------------------------------|------------------------------|------------|---------------------|--------|
| 9 | 13217300 | Contract Template | | <input checked="" type="checkbox"/> | 24 | <input checked="" type="checkbox"/> | 3 | Employment | Employment Contract | |

Contracts to Issue: Choose the Contract Template you wish to send to the selected contractors.

Task Manager → Contracts → Contracts to Issue

Contracts to Issue



Select Contract Template Contract Template      **Send Contracts** **Remove This** **Close**

Page 1 of 3 (74 items) [1] 2 3


| | Contractor ID | ForeNames | Surname | Primary Agency | Mobile Number | Email ID | Joining Date | ID |
|----------------------------------|---------------|-----------|---------|------------------------|---------------|--------------------------------|--------------|-----|
| <input checked="" type="radio"/> | 50024 | David | Blue | Hamlet Recruitment Ltd | 7700000022 | demo.invoice.payslip@gmail.com | 01/06/2020 | 389 |
| <input checked="" type="radio"/> | 50030 | James | Jones | Hamlet Recruitment Ltd | 7700000028 | demo.invoice.payslip@gmail.com | 01/06/2020 | 395 |
| <input type="radio"/> | 50031 | David | James | Hamlet Recruitment Ltd | 7700000029 | demo.invoice.payslip@gmail.com | 01/06/2020 | 396 |
| <input checked="" type="radio"/> | 50032 | Ron | Blue | Hamlet Recruitment Ltd | 7700000030 | demo.invoice.payslip@gmail.com | 01/06/2020 | 397 |

I.9 Agency Portal: Multi-Company Interface





The agencies under the Multi-Company model can now be granted access to their Agency portal.

Azure Ltd 10524 03 DEC 2020 HMRC TAX WEEK 36 | TAX MONTH 8 Draven Dravenson  

My Contractors All Contractors Search list

Sites Agency Contacts Assignments Timesheets Invoices File Uploads 

Page 1 of 6 (84 items) [1] 2 3 4 5 6

| Action | Reference | Forenames | Surname | Registration Status | NI Number | DOB | Status | Mobile Number | Email | Contractor ID | Joining Date | Leaving Date |
|---|-----------|-----------|------------|---------------------|-----------|------------|-----------|---------------|--------------------------------|---------------|--------------|--------------|
|   | AZU084 | Jan | Villalobos | | SK100083C | 11/02/1985 | In-Active | 7700000041 | demo.invoice.payslip@gmail.com | 50085 | 01/06/2020 | |
|   | AZU083 | Kenzie | Hensley | | SK100082C | 10/02/1985 | In-Active | 7700000040 | demo.invoice.payslip@gmail.com | 50084 | 01/06/2020 | |

Set the 'Allow Portal Access' to 'Yes' if you wish your agency to access their Agency Portal. If the individual agency permission settings are not set, then the default company settings will be used.

Agency Portal Settings

ALLOW PORTAL ACCESS

Yes

REQUIRE TIMESHEET APPROVAL BY THE AGENCY?

No

USE THE FOLLOWING RULES FOR THIS AGENCY?

Yes

SHOW FINANCIAL INFORMATION?

Yes

SHOW TIMESHEETS LIST?

Yes

SHOW EXPENSES LIST?

Yes

SHOW ASSIGNMENTS LIST?

Yes

SHOW SITES LIST?

Yes

SHOW CONTACTS AGENCY?

Yes

ALLOW AMENDING CONTRACTOR?

Yes

ALLOW ADD CONTRACTORS?

Yes

Note: As there have been few design changes on the portal, press (Ctrl + Shift + R) to update your cache to the latest version when you login to the portal to avoid any loading/freezing issues

2 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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