Sumetica Payroll

Client Setup Guide

April 2020

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Introduction

This document shows how to add a new client in Sumetica. A client record may be linked to a single payroll or to multiple payrolls.

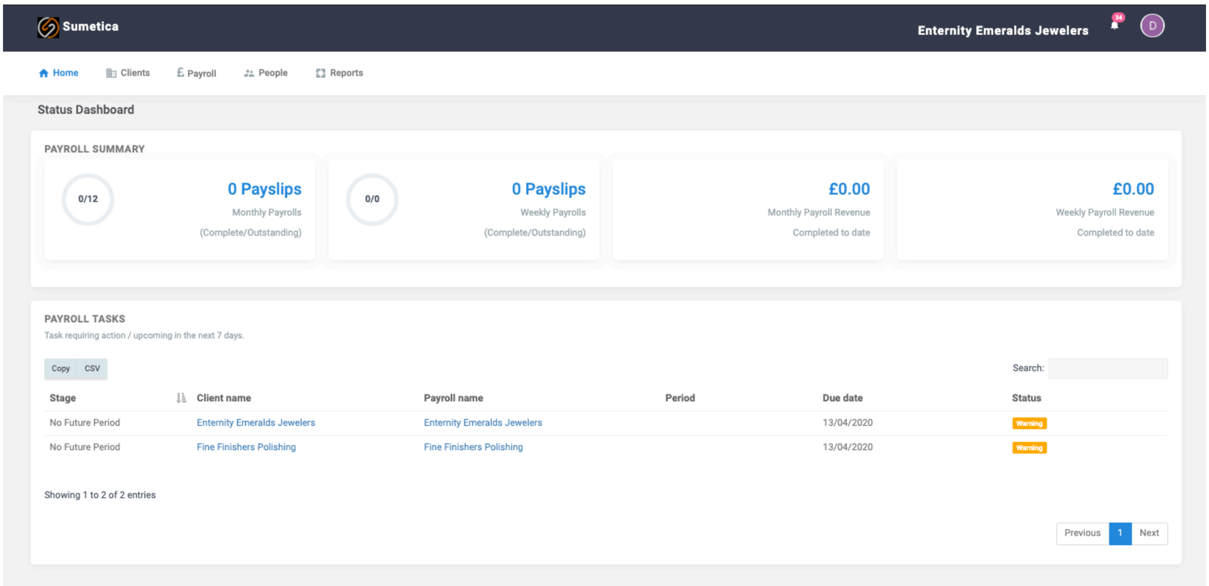
The minimum data that must be entered for a client is the client code (typically the code you use elsewhere in the organisation to refer to the client) and the client name.

You can enter client details and fees into the record. The client details are optional as are the fees, however we recommend adding fee details to show revenue for monthly and weekly payrolls on the Sumetica Dashboard.

So with the above in-mind, you should now have your username and password ready and navigate to https://payroll.sumetica.net and get started.

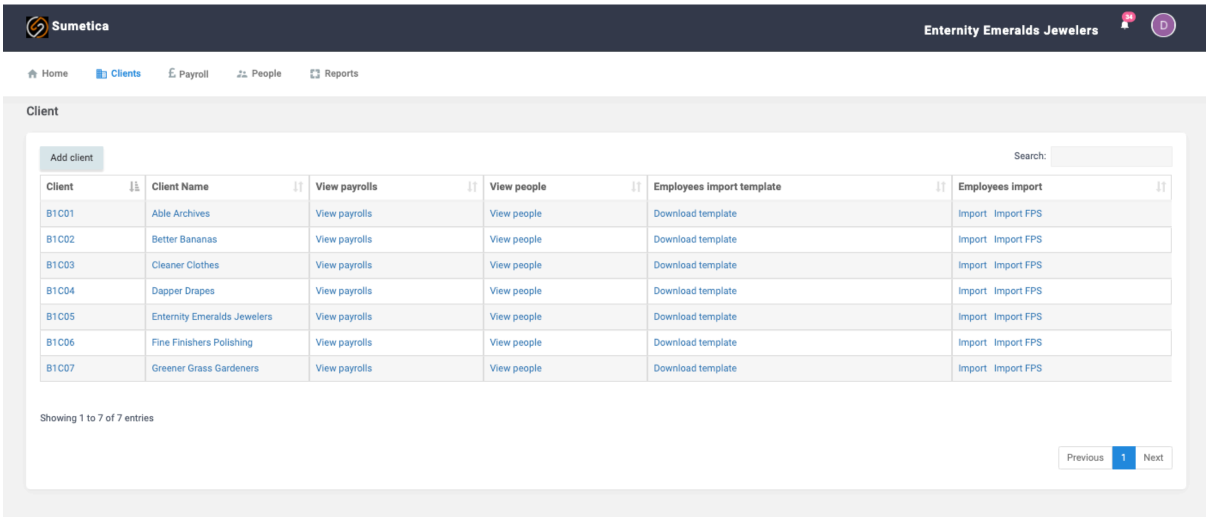
Adding a Client

By default, you will be taken to the Sumetica Dashboard page (shown below):

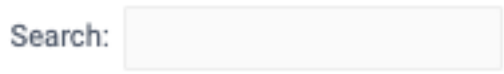


Move to the clients page, selecting the “Clients” option from the menu bar:

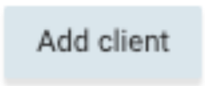
This will show you a list of all clients.



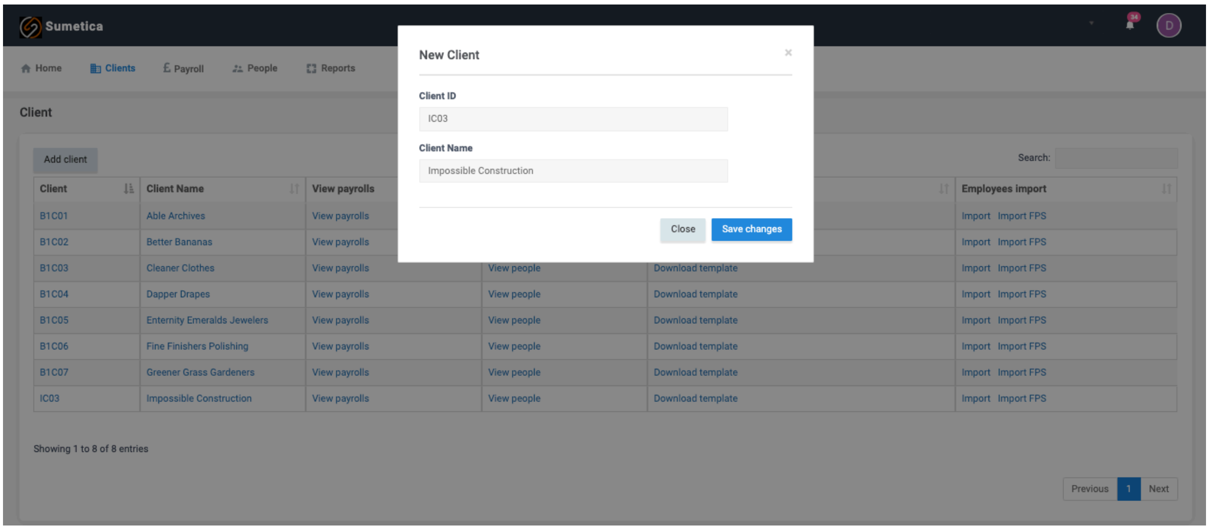
Within the clients list, you can search for a client entering text into the search box to the right of the table, will filter out clients that do not have matching text:



To add a client, press the “**Add client**” button at the top of the client list.



A popup will appear for you to enter the **client id** and **client name**.

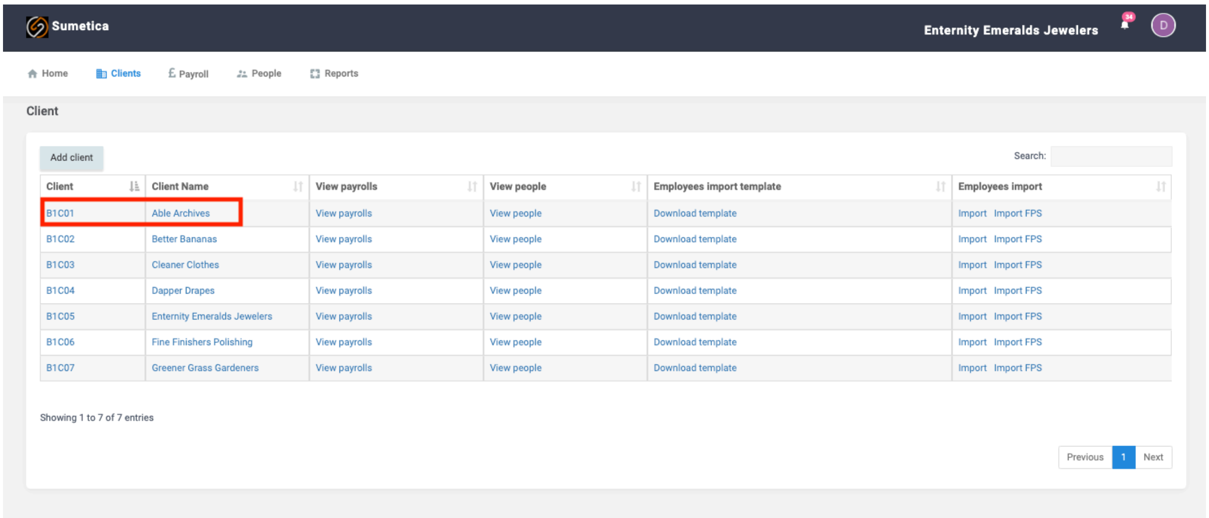


Enter those details and press the “**Save**” button.

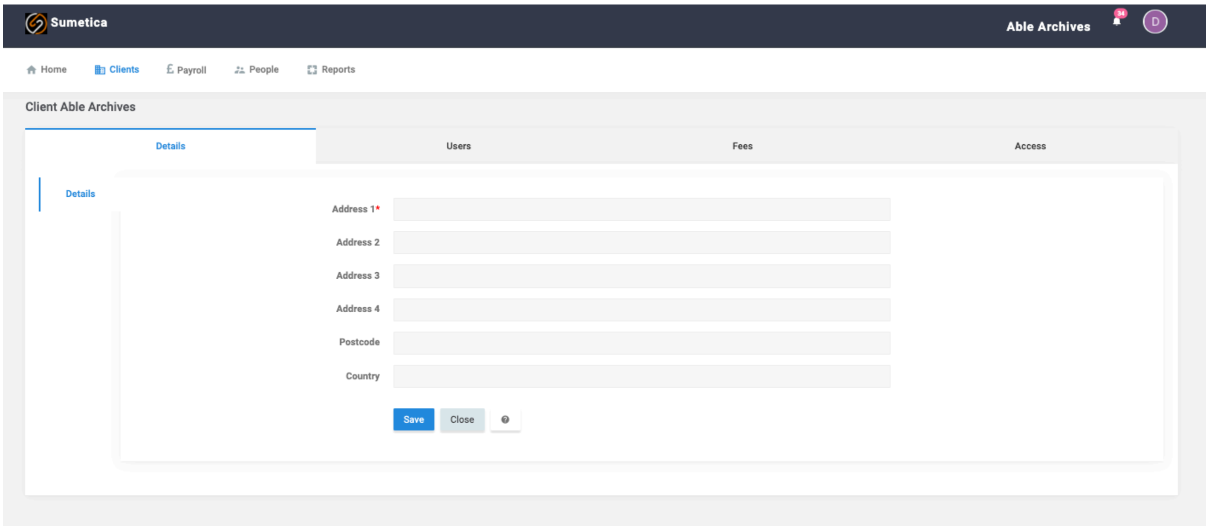
You now have a client that can be used anywhere in Sumetica.

Editing a Client Code / Name

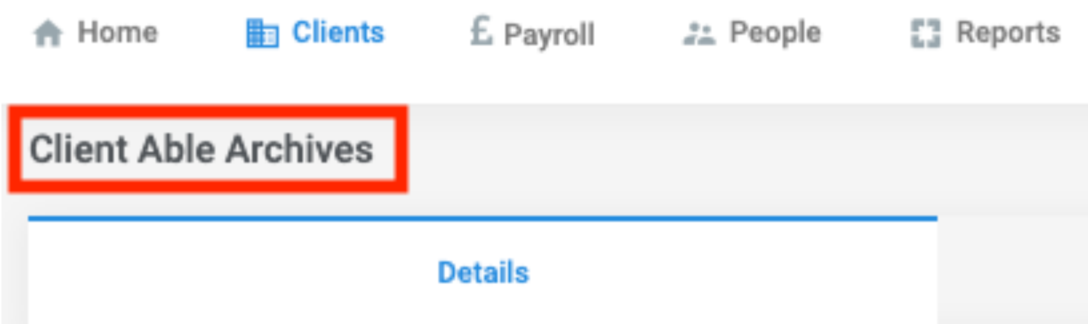
Should you ned to amend the client code or the client name, this can be done. Enter the client record by clicking on the name or the code in the list.

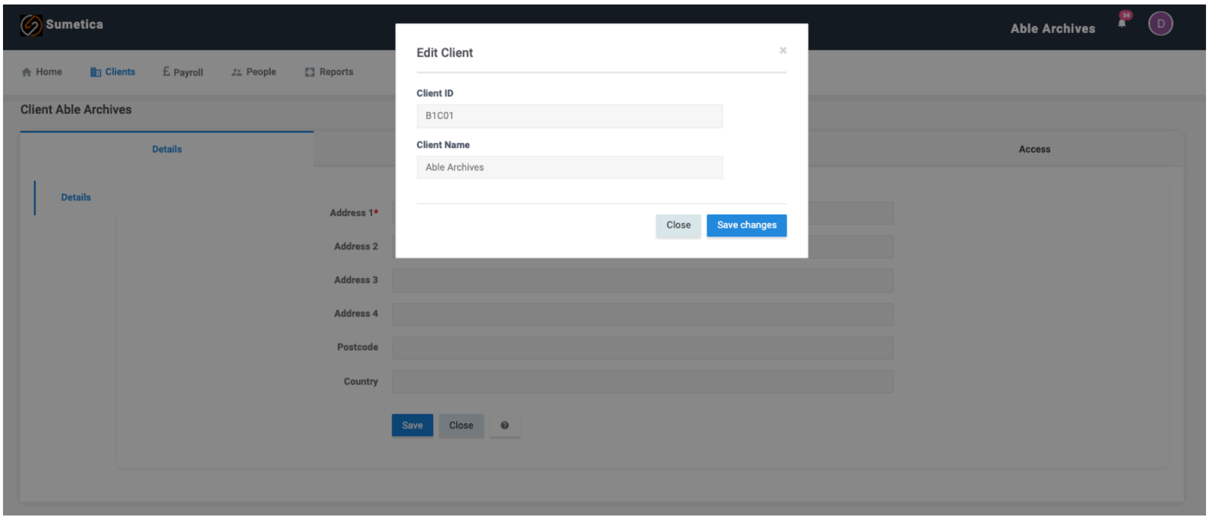


This will open the relevant client record.



Click on the name area and you will be able to edit via the popup that appears.

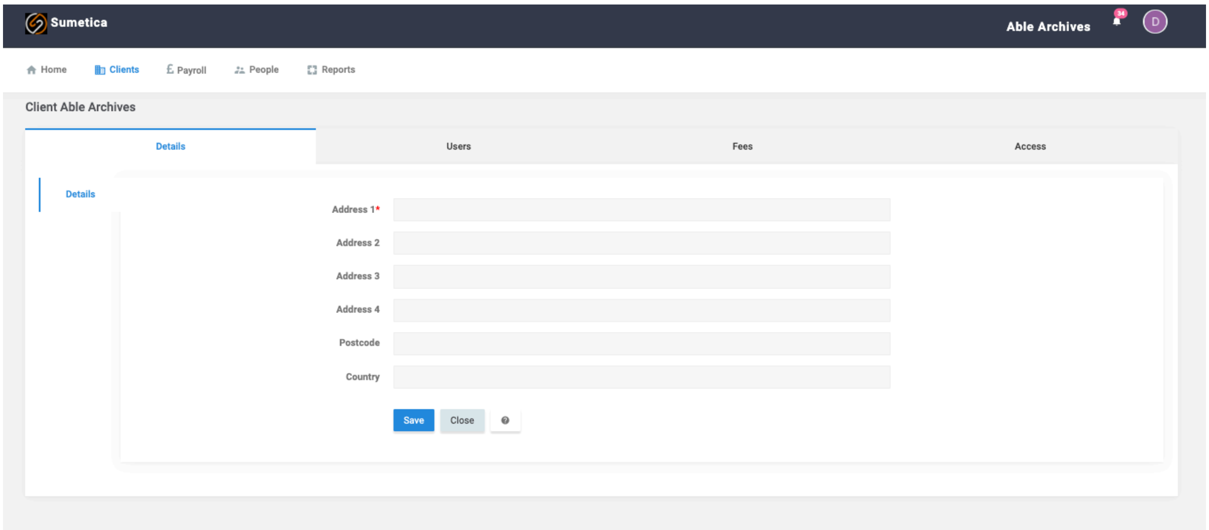




Make the changes and press the "**Save**" button. The client code and name will now be updated.

The next pages show the optional data you can add for a client.

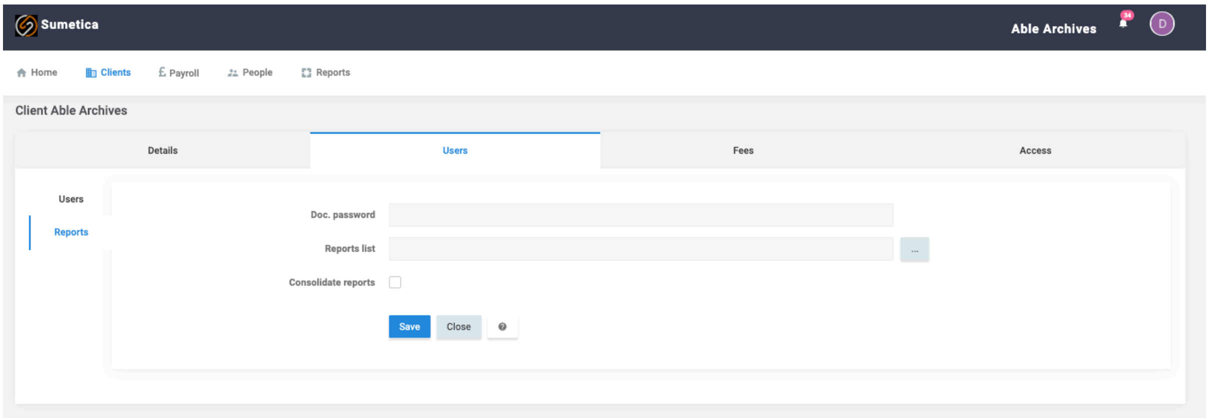
Client Details



Client address details can be added. If adding address details, then the **Address 1** field is mandatory.

Client Users/Reports

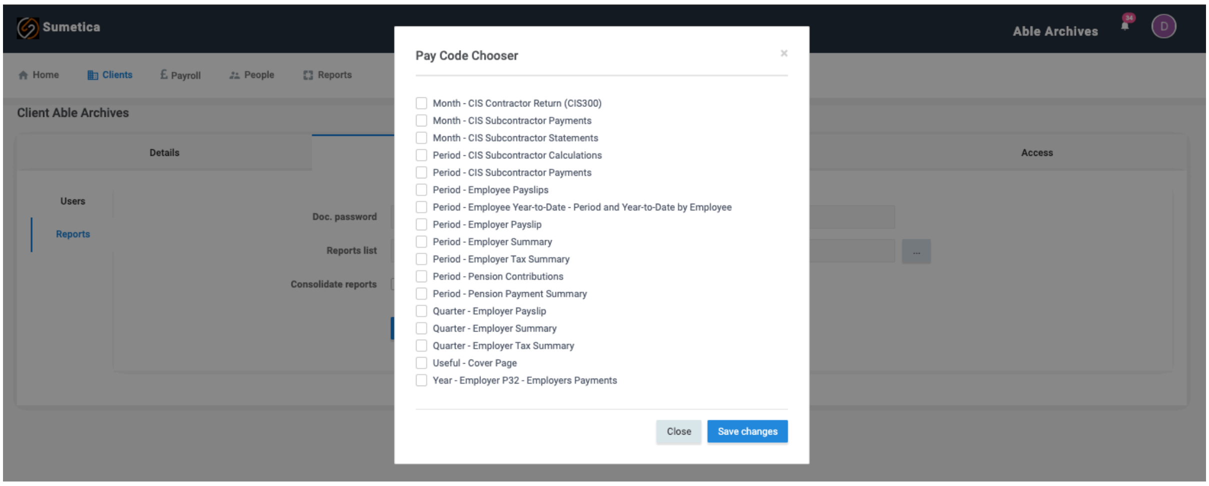
Report packs can be specified for a specific client. This allows a number of PDF reports to be packaged into a single document for sending to the client. This is done on the "**Reports**" page.

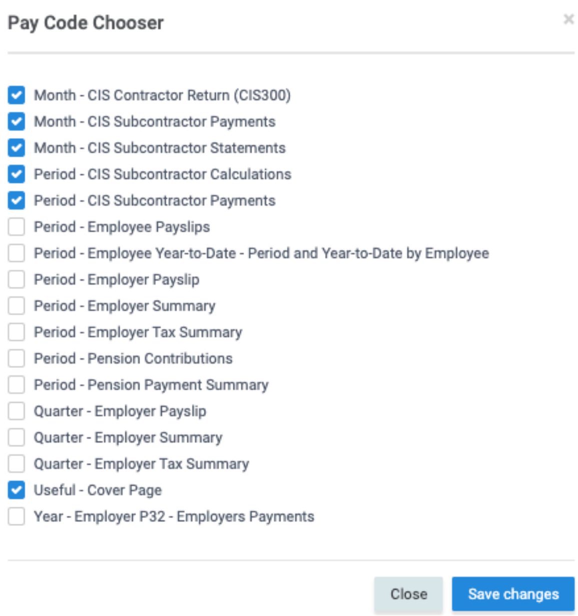


A document password can be specified in the **Doc. Password** field. When used all documents sent to the client via email from Sumetica will have this password applied.

Payslips in the reporting module will also have this password applied.

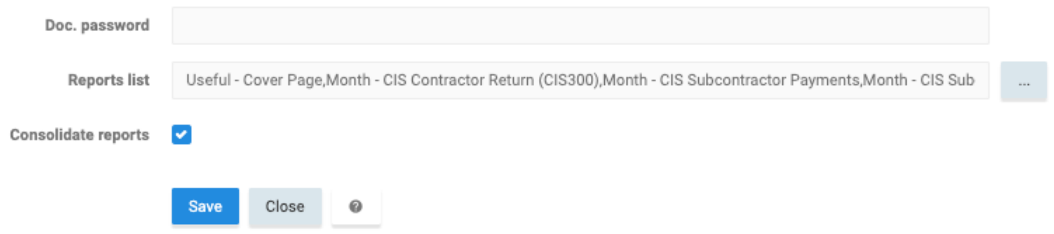
The reports list allows the reports to be added to the document which will be created for the client. Client on the **"…"** button to show the list of available reports.





Select the required reports and press the "**Save changes**" button.

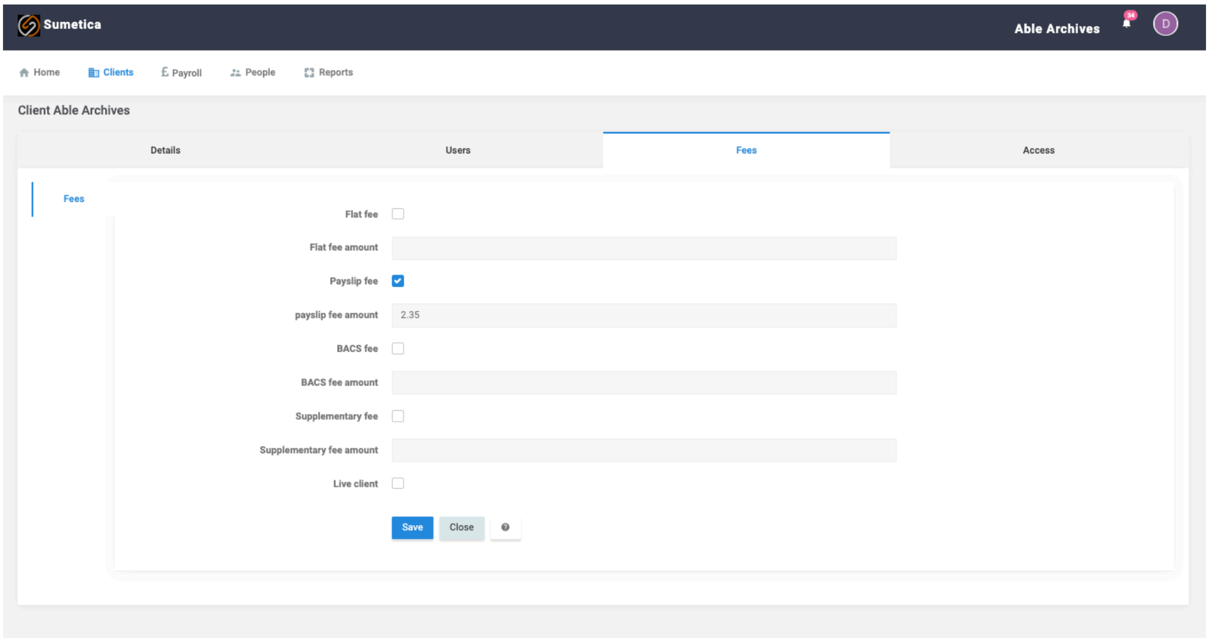
The reports list is now shown.



The **Consolidate reports** option is used to combine all of the reports into a single document.

The usage of the reporting features is covered in our Reporting Packs document.

Fees



Fees can be entered to simplify the billing process within your organisation. Sumetica will provide a billing report that you can use to generate the totals and details for billing information.

A payroll can be charged for in a mix of the following:

Flat fee – tick the "**Flat fee**" box and enter a "**Flat fee amount**" this will charge a fee for having the payroll (no relationship to the number of payslips produced).

Payslip fee – tick the "**Payslip fee**" box and enter an amount into the "**Payslip fee amount**" this will be charged per-payslip produced.

BACS fee – tick the "**BACS fee**" box and enter the "**BACS fee amount**". This will create a charge for each payment file produced.

Supplementary fee – tick the "**Supplementary fee**" box and enter an amount into the "**Supplementary fee amount**". This fee will be charged if the payroll is re-run following approval.

The "Live client" box on this screen will be ticked by default. ***Only change this if you are creating a training/ test database. Any payrolls not linked to a "live client" will run in the Sumetica Test environment only and will not connect to HMRC. It is not possible to correct this at a later point.***