Sumetica Payroll

Settings Guide

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Introduction

This document provides details on the system settings available in Sumetica and what they do.

Settings can be viewed by any users, however all but the Picklists editor are restricted to Administrators within an organisation. It is recommended that you keep the number of Administrator users low but to try to have more than one.

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.

Accessing Settings

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

Click on the initial icon to the right of the screen to access the menu.

Select the "**Settings**" option.

Pick Lists

Pick Lists control the drop-down contents when in records. Many of the drop-down lists are pre-populated and cannot be changed. However, all can be reviewed here.

To see the contents of a pick list, you first select the list you are interested in.

Drop down the list to show the pick lists available.

Scroll to the required list, for example Departments can be edited.
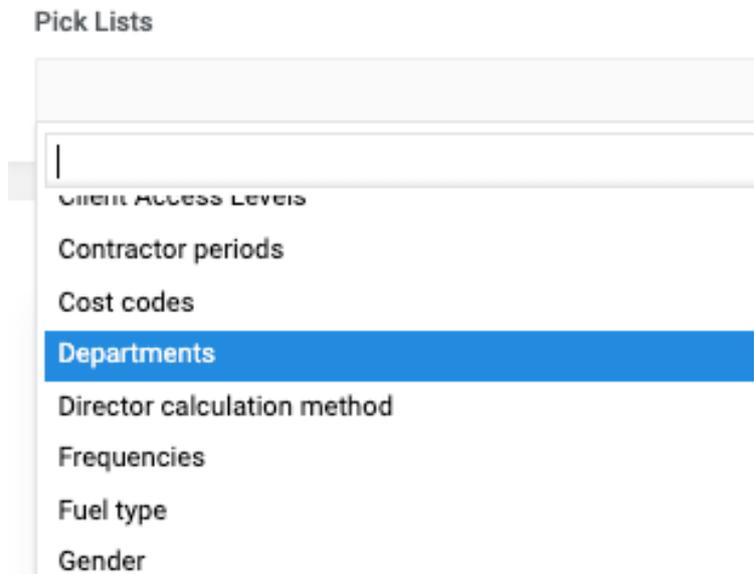
Once the list is selected the existing contents will be shown and if you are able to edit you can add/edit/remove items from the list (although you cannot remove items that are in-use).

Press the "**Add**" button to generate a new item.

Enter the value and then press the "**save**" icon to save or the "**x**" icon to abandon.

User Administration

The User Administration option allows you to add/remove and change the access level for your users. All users will be shown in the list.

To add a user enter the **name** and **email address** of the user, then click "**Save**".

The user will be created and receive password details by email. By default the user will have the lower access level.

To change the access level click the "**change**" link this will toggle between user and administrator access.

To remove a user, press the "**revoke**" link at the end of the row.

Email Settings

To link to email, enter the email address and alias (name) in the boxes. You can connect to GMail by pressing the "**Click here to link a GMail account**". Note that this functionality is awaiting approval by Google and may show some warnings.

Email Template Settings

When Sumetica is used to send an email to a client, the email is formatted from a template. This section allows you to edit these templates.

Two message types exist. A payroll when "**complete**" and a payroll requiring "**approval**". The message to be sent is determined based on the status of the payroll:

If the payroll requires approval (tick-box on Payroll Details "**Requires approval**" is ticked), then the "**approval**" template is used until the payroll is approved.

In all other cases the "**complete**" template is used.

For both email templates, the subject line and the message text can be edited.

Edit the subject line, message text and press the "**Save**" button when done.

The editor supports a subset of HTML (as used to create webpages). You can paste in existing text, add links and images as you require.

Templates also exist for Starter (Employee) and Starter (Sub-contractor) Forms that can be sent from Sumetica. These are setup in the same way as above.

A range of "merge" fields are available to use and should be entered as below in the [brackets] with no spaces:

[employer]	The name of the employer
[payroll_name]	The name of the payroll
[period]	The current payroll period (e.g. 2020/01)
[pay_date]	The current period pay date (e.g. 15/04/2020)
[attached_summary]	Text description of any attachments
[hmrc_payment_month]	The month name (e.g. May) that the next HMRC payment is due
[paye_tax]	The PAYE due for the current period
[employee_ni]	The Employee NI due for the current period
[employer_ni]	The Employer NI due for the current period
[other_deductions]	Any other deductions due for the current period
[hmrc_total]	The total due to HMRC for the current period
[employment_allowance]	The employment allowance (shown as a negative value).
[text_last_period]	If the last pay period in the tax month, this shows the word "final" otherwise "shows tax-period-to-date" (indicates a running total).
[p32_start] and [p32_end]	These are used to signal a block of text (e.g. the payment to HMRC instructions, which should only be shown when it is the final pay period of the tax month.

The [approval_link] should only be used in the body of the email being sent for approval. When the email is generated a secure link to a payroll approval form is created and embedded into the email (for further details see the Payroll Approval Workflow Guide).

List Settings

List Settings

Use a value from 0 to 200 in the boxes below to configure the list sizes for your organisation

Task list page size (0 = unlimited)

Task list page size

Page list page size (0 = unlimited)

Page list page size

☐ Allow export of Task List

Save

List settings control the length of the lists shown on various pages in Sumetica. To standardise across an organisation the settings are controlled by Administrators.

You have the ability to set the length of the **Payroll Tasks List** on the Sumetica Dashboard. Using a value of **zero** will make the list show all items.

You can change the size of all other lists in the same way, although the setting applies to **every list** (Reports, Clients, Pay Codes etc.). Again set the size that is required using zero for all.

Finally, you can control if the Payroll Task List can be exported. By default this is off, the list does not allow save/export but by ticking the "**Allow export of Task List**" box you can allow this.

Change any values and press "**Save**" the changes will be visible on next login for each user.

Logo Settings
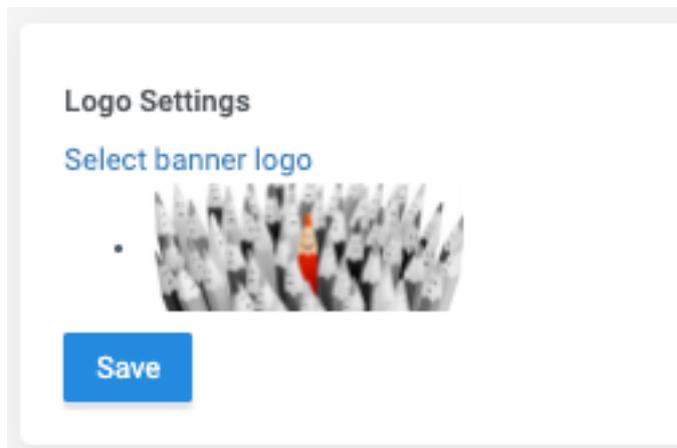
The organisation's logo can be used in three places within Sumetica:

- On a cover page for report packs.

- On the Payroll Approval Form

- On the New Starter Entry Form

Click on the link "**Select banner logo**" to select a new jpg/png file to upload.

For best results use a smaller logo, you may need to experiment a little to find the size that works best. Where the logo is scaled automatically we make every effort to ensure it is not distorted but checking after each change on all three locations is recommended.

Once you have selected the logo, press "**Save**" to confirm / upload.

Client Accessible Page Settings
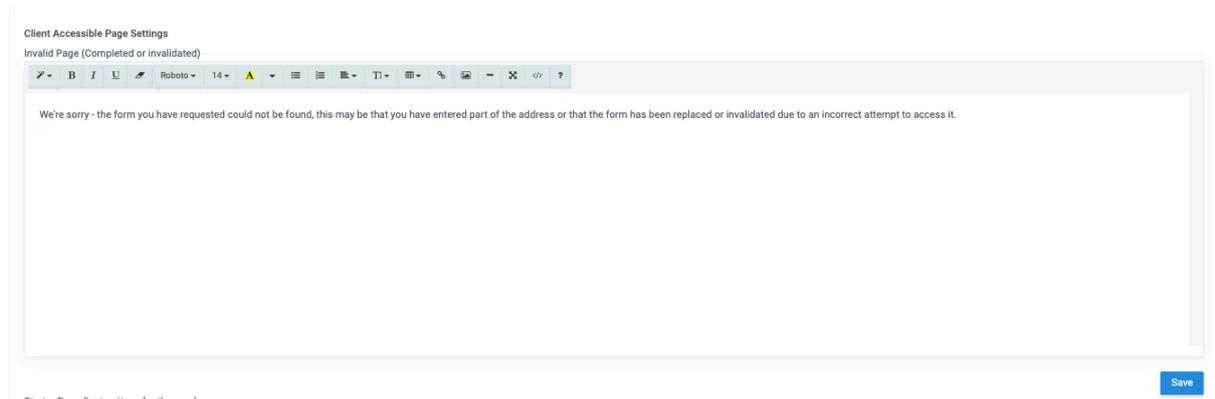
Three messages are available for clients, when using the client facing pages. This allows you to provide extra information about the page and contact details etc.

The messages are:

Invalid Page – if we manage to find the page but for any reason it is invalid (maybe superseded by a newer version, or if part of the secure link has been requested but not all of it) or it has already been completed, you can provide additional information.

As with the email editor, the message supports formatting etc. and can include further links.

Note – if we cannot determine what the user is requesting, we cannot associate them with an Agent organisation and show only a basic Sumetica message that what they are searching for cannot be found.

Change the message for an invalid page and press the "**Save**" button to store.

Starter Page (instructions for User) – here you can have a message display at the top of the starter entry form. You may be providing additional information or instructions.

Enter the message and any formatting, then press "**Save**" to store.

Payroll Approval Page – here you can give additional information about why approval is needed.

You can control two further aspects of the payroll approval. You control if the client see's the Net Pay total that they are approving; and you can require the client to re-key the Net Pay to confirm. These are controlled via the tick-boxes:

Payroll Approval Page (Instructions for the user)

☐ Show total Net Pay

☐ Require entry of Net Pay to proceed

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Tick the boxes, enter the message and press "**Save**" to store.

HMRC Agent Settings

As an agent, you will almost certainly have a set of credentials that will be used across clients to login to HMRC systems, and these credentials are entered into each Sumetica Payroll and Contractor record to facilitate DPS (Data Provisioning Service) messages and RTI (Real Time Information) filing.

In the HMRC Agent Settings area you can configure the default Username (Sender Id) and Password to be used.
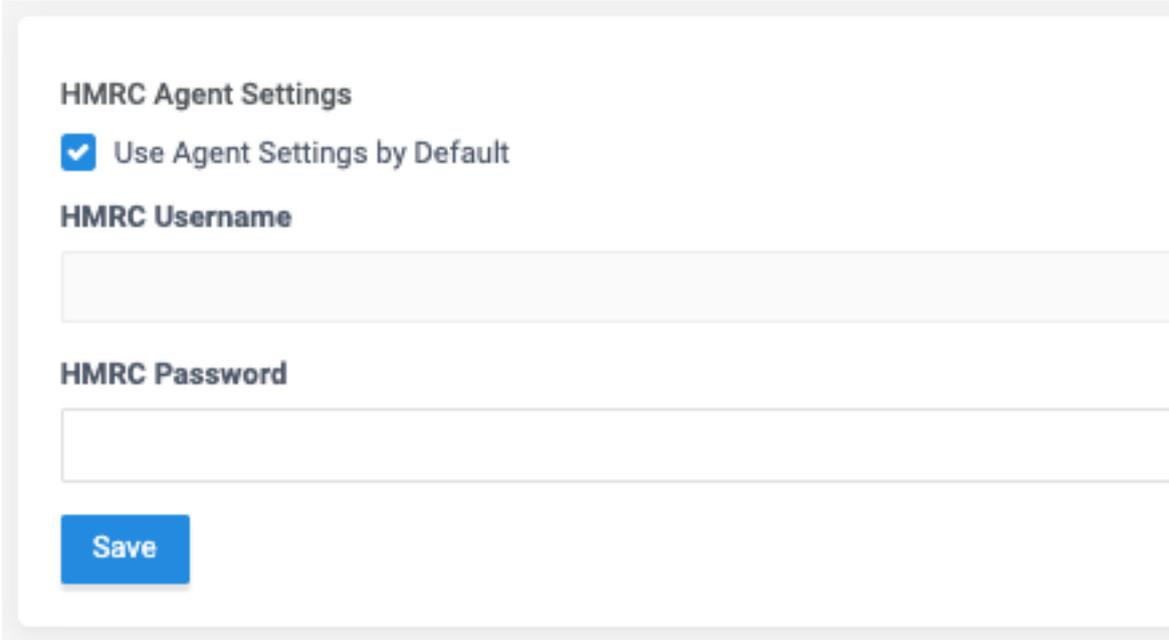

Tick the box and enter the relevant details. If you have already configured payrolls in Sumetica, this will not overwrite these (in that case you should enter the most commonly used credentials, should you have more than one set). Press the "**Save**" button to store.

When these are updated, any Sender Id or Password matching the old values will be updated to the new values.

When new payrolls (or contractors) are created these settings will be used automatically.

Starter Form Settings

The Starter Form has a number of sections, a subset of these sections can be switched on/off depending on what data you wish to collect from your clients on the form. By default all sections are enabled, to remove a section untick and press the "Save" button.
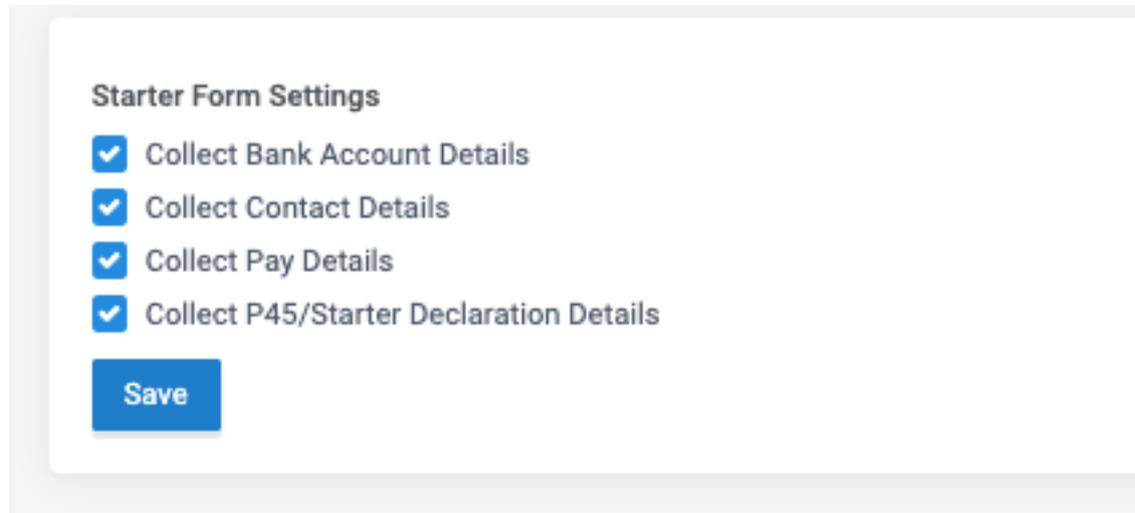
Starter Form Settings

- ☑ Collect Bank Account Details
- ☑ Collect Contact Details
- ☑ Collect Pay Details
- ☑ Collect P45/Starter Declaration Details

[Save]