

# **HUMAN RESOURCES**

# **EMPLOYEES - PAYROLL DATA**

**Payroll Data** can be set up to include payroll, income tax, pension, medical aid and union details for example, that are not already set up on the system.

You can make changes directly in this screen, using the *search* buttons and *drop-down arrows*. You can *Save* any changes as required.

**Ribbon Access:** Finance and HR > Employees

						BPO: Version 2.4.0.	11 - Example Con	npany					X
	Equipment /	Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
Financial Periods	Debit Order Batches	Employees	Crafts										
Finar	nce y	Human Res	ources 🖌										\$

1. The *Employees* listing screen will be displayed.

# VIEW EMPLOYEE PAYROLL DATA

#### SELECT EMPLOYEE

- 2. Select the *row* of the employee whose payroll data you wish to *view*.
- 3. Click on the *Payroll Data* tile.



#### Employee Payroll Data

					Employees - BPO: Version 2.5.0.0 - Examployees -	mple Company v2.	5.0.0					
	Home Eq	uipment	/Locations Contrac	t Finance / HR	Inventory Maintenance / Projects	Manufacturing F	Procurement	Sales Serv	ice Reporti	ng Utilitie	is .	- 8
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			DUT001	Bianca Du Toit	kameshni.pillay@co3.co.za	Belinda Sharman	Sales	031 123 4564	083 123 4567	1234	A	
			DUT002	Tammy Du Toit	Tammy@TEST ALPHA v2.4.0.0 DB.co.za						A	
Overtime	and		DUT004	Test Employee	Test@TEST ALPHA v2.4.0.0 DB.co.za						A	
Holidays			DUT005	Mary Saunders	Mary@TEST ALPHA v2.4.0.0 DB.co.za						A	
			DUT010	Bianca Surendorff	Bianca@TEST ALPHA v2.4.0.0 DB.co.za			031 123 4564	083 123 4567	1234	Α	
Compete	<b>P</b> 50		E147282	Jade Rivers	Jade@TEST ALPHA v2.4.0.0 DB.co.za						A	
Manager			E987654	Jeff Rivers	Jeff@TEST ALPHA v2.4.0.0 DB.co.za						A	
			EMP123	Carolina Suzzetta L							A	
			HAR001	Wesley Haynes	Wesley@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit					A	
Payroll D	ata		30001	Sasha Jones		Bianca Du Toit	Sales				A	
			JOH001		Michael-Stark@TEST ALPHA v2.4.0.0 DB						A	
			JU01	Judah Milne	judahm@test.co.za.za	Belinda Sharman	Sales	9876543210	1122334455	7	A	
Banking E			KES001	Julanda Kessler			Sales				A	
			KHU001	Andile Khumalo	Andile@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales				A	
			MIL001	Abigail Milne	Abigail@TEST ALPHA v2.4.0.0 DB.co.za		Sales				A	
Custom D	)etails	-Ŀ	MUD001	Judith Mudzengi	Judith@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales	123 456 7890			A	
6			NDW001	Sne Ndwalane	snenhlanhla.ndwalane@co3.co.za		Sales				Α	
	/		PIL001	Kame Pillay	kameshni.pillay@co3.co.za						A	
Loans			RED001	George James Red		. Wesley Haynes					A	
codina			REP001	Marc Repsold	marc.repsold@co3.co.za		Sales				A	
			SHA001	Belinda Sharman	Belinda@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit					A	
			STE001		Markus Arilius@TEST ALPHA v2.4.0.0 DB	. John Twain					A	
			ST0001	Trav Stakan			Color				٨	

1. The *Payroll Data for: []* screen will open.

#### **VIEW PAYROLL DETAILS**

2. Here you can *view* any payroll information that has been entered into the system for the selected employee.

# ADD PAYROLL DATA

You will note that there is no **Add** button in this screen. Information is added in the following ways:

- i. Typing directly in a text box.
- ii. Using the *search* buttons and the subsequent *Select...* screens.
- iii. Using the *drop-down arrows* and the subsequent *drop-down lists*.



<b>₽ =</b>	1	Payrol	l Data for : MUD	001 - BPO: Version 2.5	.0.0 - Example	Company v2.5.0.0	1					
Home Equipme	ent / Locations Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	8 ×
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Payroll Type	SALARY	ρ Direc	tor/CC Member	r 🗆								
Employment Category	Occupation 1	•										
Employment Area	Area A	• • • •	🔟									
Pay Rate	10000		Pay Period	i Monthly	•							
Pay Method	Electronic Transfer	-	lature of Persor	Legal Person	•							
Additional Tax On	0											
Start Date	01/01/2000	• Te	ermination Date	01/01/2030	•							
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Union Member		_										
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Council Levy Flag												
1												

#### ADD PAYROLL DETAILS

Type in or use the search and drop-down lists to enter the following information:

- Payroll Type: Click on the *search* button and choose the relevant option from the '*Select a Payroll run type*' pop-up screen.
- Director / CC Member: Select this check box if this employee is a director or a member of a close corporation.
- **Employment Category**: Click on the drop-down arrow and select from the list the category of employment linked to this employee.
- **Employment Area**: Click on the drop-down arrow and select from the list the area of the company where this employee is based.
- **Pay Rate**: Type in the amount of pay per period of work. This works in conjunction with the next field.
- Pay Period: Click on the drop-down arrow and select the recurring length of time over which employee time is recorded and paid e.g. Monthly, Weekly, Daily.



- Pay Method: Click on the drop-down arrow and select from the list, the method by which this employee will receive their pay e.g. EFT, Cash.
- Nature of Person: Click on the drop-down arrow and select from the list the relevant type e.g. *Natural* if the employee is considered to be ordinarily resident for income tax purposes,
- Additional Tax On:
- Start Date: Either type in, or click on the drop-down arrow and use the calendar function to select the date the employee joined the company.
- Income Tax Number: Type in the unique personal number given to the employee by the country's revenue services.

	Payroll Data for	: MUD001 - BPO: Version 2.5	i.0.0 - Example Co	mpany v2.5.0.0						x
Home Equipment / Locations Contract	t Finance / HR Invento	y Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	- 1	8 X
Save Back Workspaces										\$
Payroll Type SALARY	م Director/CC M	ember 🗌								
Employment Category Occupation 1	•									
Employment Area A	•									
Pay Rate 10000	Pay	Period Monthly	•							
Pay Method Electronic Transfer	<ul> <li>Nature of</li> </ul>	Person Legal Person	•							
Additional Tax On 0										
Start Date 01/01/2000	<ul> <li>Terminatio</li> </ul>	n Date 01/01/2030	•							
Income Tax Number 1122334455										
Union Member 🖌										
Union New Union	Q									
Pension Member 🖌										
Pension/Provident Pension Fund	Q									
Medical Scheme Flag 🗹										
Medical Scheme BonSave	۶ Scheme N	umber 1001								
Scheme Option Family option 1										
Council Levy Flag 🗌										

- Union Member: Select this check box if the employee is a union member.
- Union: Click on the *search* button and choose the relevant option from the '*Select a Union*' pop-up screen.



- Pension Member: Select this check box if the employee is linked to a pension scheme.
- Pension/Provident: Click on the *search* button and choose the relevant option from the '*Select a Pension fund*' pop-up screen.
- Medical Scheme Flag: Select this check box if the employee is linked to a medical aid scheme.
- Medical Scheme: Click on the *search* button and choose the relevant medical aid scheme option from the '*Select a Medical scheme*' pop-up screen.
- Scheme Option: Type in the *type* of medical aid plan the employee has with the medical scheme named above e.g. Hospital Plan, Classic Saver Plan.
- **Scheme Number**: Type in the unique medical aid scheme number, pertinent to the employee.
- Council Levy Flag:

#### SAVE PAYROLL DETAILS

When you have finished adding the payroll details, click on *Save*.

<b>‡</b> ₹		1	Payroll Data for : MUD	001 - BPO: Version 2.5.	0.0 - Example Co	mpany v2.5.0.0					_ D X
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Payroll Type	SALARY	Q	Director/CC Member	· 🗆							
Employment Category	Occupation 1	•									
Employment Area	Area A	•									
Pay Rate	10000		Pay Period	Monthly	•						
Pay Method	Electronic Transfer	•	Nature of Person	Legal Person	*						
Additional Tax On	0										
Start Date	01/01/2000	•	Termination Date	01/01/2030	*						
Income Tax Number	1122334455										
Union Member	$\checkmark$										
Union	New Union	Q									
Pension Member	$\checkmark$										
Pension/Provident	Pension Fund	Q									
Medical Scheme Flag	$\checkmark$										
Medical Scheme	BonSave	Q	Scheme Number	1001							
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Council Levy Flag											



- 1. A message box will pop up advising the following:
  - ° Payroll has been saved.
- 2. Click on *OK*.

<b>₽</b> . <del>-</del>			Payroll Data for : MUD	001 - BPO: Version 2.5.	.0.0 - Example Co	mpany v2.5.0.0					_ <b> </b>
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Pension Member	$\checkmark$				2		UK				
Pension/Provident	Pension Fund	Q									
Medical Scheme Flag	$\checkmark$										
Medical Scheme	BonSave	Q	Scheme Number	1001							
Scheme Option											
Council Levy Flag											

The details will be saved and you will return to the *Employees* listing screen.

# EDIT PAYROLL DATA

#### **SELECT EMPLOYEE**

- 1. In the *Employees* listing screen.
- 2. Select the *row* of the employee whose payroll data you wish to *edit*.
- 3. Click on the *Payroll Data* tile.



#### Employee Payroll Data

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	Home	Eq	quipm	ent /	Locations Co	ontract	Fir	nance / HR	Inv	entory	Mair	ntenance	/ Projects	N	anufacturing I	Procurement	Sales Serv	ice Reporti	ng Utilitie	is .	- 8	
Add	Edit	X Delete	Vie	ew	Save Layout	Works	paces	Reports	Export	Refr	esh	Print										
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1. The *Payroll Data for []* screen will open.

#### EDIT PAYROLL DETAILS

Make the changes as required.

 In this example, the Nature of Person has been changed from Legal Person to Natural Person using the drop-down <u>arrow</u> and selection from the subsequent drop-down <u>list</u>.



<b>₽</b> =	1	Payroll Data for : MUDO	001 - BPO: Version 2.	5.0.0 - Example Cor	mpany v2.5.0.0				_ <b> </b>
Home Equipme	ent / Locations Contract	Finance / HR Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales Servi	e Reporting	Utilities	- 8 ×
Save Back Workspace: Maintenance Format	s								\$
Payroll Type	SALARY	P Director/CC Member							
Employment Category	Occupation 1	-							
Employment Area	Area A	-							
Pay Rate	10000	Pay Period	Monthly	•	_				
Pay Method	Electronic Transfer	<ul> <li>Nature of Person</li> </ul>	Legal Person	<b>•</b> • •		2			
Additional Tax On	0		Type M Descrip						
Start Date	01/01/2000	<ul> <li>Termination Date</li> </ul>	L Legal Person N Natural Pe	erson 🖌					
Income Tax Number	1122334455								
Union Member	$\checkmark$								
Union	New Union	Q							
Pension Member	$\checkmark$		x		8				
Pension/Provident	Pension Fund	P							
Medical Scheme Flag	$\checkmark$								
Medical Scheme	BonSave		1001						
Scheme Option									
Council Levy Flag									

- 1. When you have finished making the required changes,
- 2. Click on *Save*.

<b>⊕ =</b>			Payrol	Data for : MU	0001 - BPO: Version 2.	5.0.0 - Example Co	mpany v2.5.0.0						
Home Equipme	ent / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	- 4	7 ×
Save Back Workspace	s												
Maintenance "Format	2												$\diamond$
Payroll Type	SALARY		P Direc	tor/CC Memb	er 🔲								
Employment Category	Occupation 1		•										
Employment Area	Area A		•										
Pay Rate	10000			Pay Perio	d Monthly	•							
Pay Method	Electronic Transfe	r	-	lature of Perso	n Natural Person	• •	1						
Additional Tax On	0												
Start Date	01/01/2000		• Te	ermination Dat	e 01/01/2030	•							
Income Tax Number	1122334455												
Union Member	$\checkmark$												
Union	New Union		P										
Pension Member	$\checkmark$												
Pension/Provident	Pension Fund		Q										
Medical Scheme Flag	$\checkmark$												
Medical Scheme	BonSave		Q	Scheme Numb	er 1001								
Scheme Option													
Council Levy Flag													

- 1. A message box will pop up advising the following:
  - Payroll has been saved.



#### 2. Click on *OK*.

<b>₽</b> . <b>=</b>			Payrol	Data for : MUD	001 - BPO: Version 2.5	.0.0 - Example Co	ompany v2.5.0.0	)					
Home Equipme	ent / Locations C	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	8 ×
Save Back Workspaces													
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Payroll Type	SALARY	ر	D Direc	tor/CC Membe	r 🗌								
Employment Category	Occupation 1		•										
Employment Area	Area A		•						×				
Pay Rate	10000			Pay Perior	d Monthly	•							
Pay Method	Electronic Transfer		• N	ature of Perso	n Natural Person	•	Payroll has bee	n saved		1			
Additional Tax On	0						,						
Start Date	01/01/2000		• Te	ermination Date	e 01/01/2030	•		ОК	1				
Income Tax Number						0		UK					
Union Member													
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Pension Member			_										
Pension/Provident		ر	D										
Medical Scheme Flag			_										
Medical Scheme		)	o <u>s</u>	Scheme Numbe	r 1001								
Scheme Option													
Council Levy Flag													

The details will be saved and you will return to the *Employees* listing screen.

# **DELETE PAYROLL DATA**

You can only edit the information in the Payroll Data screen, you cannot delete <u>all</u> the payroll data for an employee.

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