Sirius Payroll365

SiriusPayroll365 Setup Guide

SiriusPayroll365 is a product of SiriusApp. Dogma Group is the new Parent of SiriusAPP. The Dogma Group also includes SeeLogic Limited, SeeLogic International and DynamicAI.

DogmaGroup

SeeLOGiC
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Contents

INSTALLATION GUIDE

After you install the SiriusPayroll365 extension from the marketplace, you will need to use an assisted setup before you start using Payroll. Assisted Setup will help you to configure the HMRC related configurations and activates the extension so that you can use the features inside it.

1. When you first login to business central, change your profile to **"Payroll Processor"**.

2. Now in your profile role center, you will see the notification as below.

3. Click on the **"Click here to configure"** action on the notification bar. It will open the Welcome Page and provide you with a link for the documentation and terms of use. After reading the terms of use, mark yes on **"I understand and accept these terms"** and click on the Next button.

4. In this screen, mark true on **"Apply HMRC Settings"**. This will create all the settings required to run payroll. Now click on the **"Start update"** button. It will configure the system in a few minutes.

- **Activation Method/Licensing:**

  You will need either Dynamics 365 Business Central essential or a premium license to use the Siriuspayroll365 extension within Business Central.

  SiriusPayroll365 is based on a subscription license. You will need to buy a subscription based upon how many employee payrolls you want to process per month.

  Following are the different options you can choose on how to activate the module. Pay-As-You-Go option is for sandbox testing. QBS Subscription activation method is for the production environment. You can also use QBS Subscription in a sandbox environment. Using the QBS subscription license on sandbox will not trigger any consumption of your actual purchased subscription.

1. **Pay-As-You-Go**

   If you want to use the subscription now and pay later, then you can choose this option. For sandbox, this subscription is free to use for 30 days. You can speak to your partner or reseller if you want to extend the trial.

2. **QBS Subscription**

   If you have already purchased a QBS Subscription from our partner or reseller, then you can choose this option. This option is available for the sandbox as well as the production environment.

SiriusPayroll365 Setup ↗ ✕

Let's get started

Apply HMRC Settings · · · · · · · · ⬤

Activation Method · · · · · · · · · · | QBS Subscription ▾ |

Select this option if you have purchased QBS Subscription from our partner or reseller. Speak to your QBS account manager and provide them your tenant ID and your company name to get started with your payroll.

QBS Subscription option is available for both sandbox and production environments.

Essential Experience / Sample Data / Setup Data

Get the Essential functionality scope containing everything you need to start using SiriusPayroll365. For this Sandbox environment, you will get free subscription.

Included:
 * Subscription per month: 3
   - Get 3 employee subscription for testing
   - Create and post payroll for 3 employees per month

| Back | Next | **Start update** |

ADMINISTRATION

You can always configure the system the way you like based upon the setups provided. The following guide will help admin users to know what each setup does inside SiriusPayroll365.

1.   User personalisation

Select **"Payroll Processor"** in user personalisation of a payroll processor.

After the "Payroll Processor" role is assigned to the user, then user can view all the setup related to the payroll in the role center as show in screen shot below.

2.   Payroll Setup

Users can navigate to the Payroll Setup from either the role center page or can search for payroll setup by clicking on the search icon.

Payroll Setup

General

Payroll Fiscal Year Start Date	1/1/2001		Make Payroll Slip Confidential	⬤
Payroll Fiscal Year End Date	1/1/2023		Total Days	0.00
Posting Method	Employee Wise		Skip Posting to G/L	◯
Pay Deduction Basis on Leave	Per Working Days		Payslip Remarks	QA INSTANCE -BIPLAV
Tax Calculation Type	Yearly			

Posting Group

Net Payable Account Type	G/L Account		Net Payable Account Code	51600

Numbering

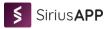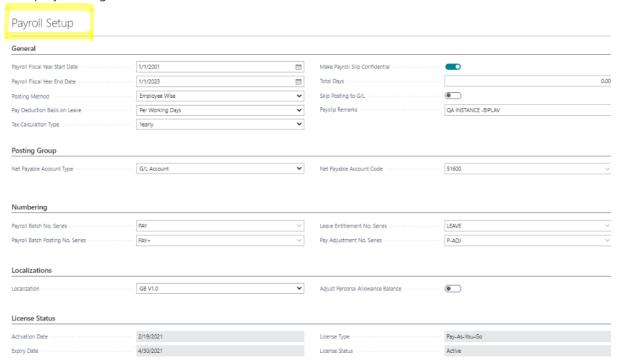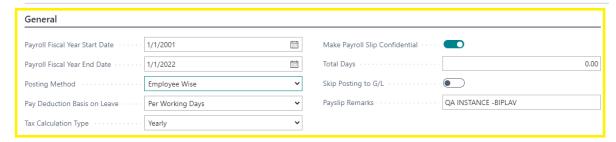|				
Payroll Batch No. Series	PAY		Leave Entitlement No. Series	LEAVE
Payroll Batch Posting No. Series	PAY+		Pay Adjustment No. Series	P-ADJ

Localizations

Localization	GB V1.0		Adjust Personal Allowance Balance	◯

License Status

Activation Date	2/19/2021		License Type	Pay-As-You-Go
Expiry Date	4/30/2021		License Status	Active

In the **General tab**, fill in the general information required for payroll processing. Like payroll fiscal year start and end date and many more as shown in the screenshot below.

Payroll Setup

General

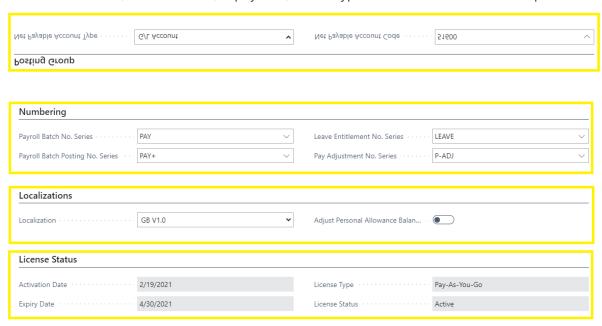|				
Payroll Fiscal Year Start Date	1/1/2001		Make Payroll Slip Confidential	⬤
Payroll Fiscal Year End Date	1/1/2022		Total Days	0.00
Posting Method	Employee Wise		Skip Posting to G/L	◯
Pay Deduction Basis on Leave	Per Working Days		Payslip Remarks	QA INSTANCE -BIPLAV
Tax Calculation Type	Yearly			

Similarly, fill the **Posting group** tab with the GL account on which the payroll ledgers need to be posted.

And select the no. series in the Numbering section so that automatic no. series is generated while processing the payroll document.

In Localizations tab, the localization field is auto updated.

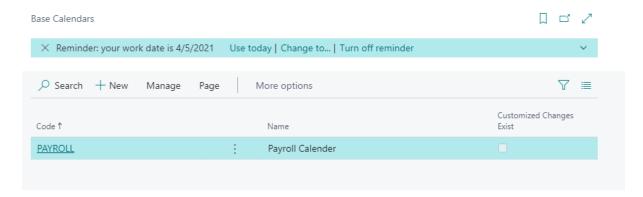In License status tab, activation date, expiry date, license type and license status are auto updated.

Posting Group

Net Payable Account Type	G/L Account	Net Payable Account Code	31600

Numbering

Payroll Batch No. Series	PAY	Leave Entitlement No. Series	LEAVE
Payroll Batch Posting No. Series	PAY+	Pay Adjustment No. Series	P-ADJ

Localizations

Localization	GB V1.0	Adjust Personal Allowance Balan...	⬤

License Status

Activation Date	2/19/2021	License Type	Pay-As-You-Go
Expiry Date	4/30/2021	License Status	Active

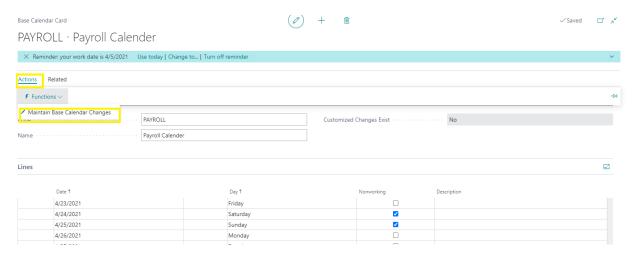Note: If adjust Personal Allowance Balance is enabled, each
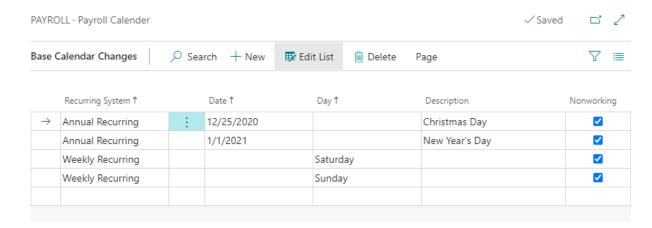
3.   Base Calendar Setup

To create a base calendar for payroll, search Base Calendar using the search icon in BC and click on new and then assign code and name of the calendar.

Base Calendars

X Reminder: your work date is 4/5/2021   Use today | Change to... | Turn off reminder

Search   + New   Manage   Page | More options

Code ↑		Name	Customized Changes Exist
PAYROLL	⋮	Payroll Calender	☐

To assign the holidays, go to **action** then click on **function** and then on **Maintain Base Calendar Changes** as shown below in the screenshot.

Base Calendar Card
PAYROLL · Payroll Calender

X Reminder: your work date is 4/5/2021   Use today | Change to... | Turn off reminder

Actions   Related

⚡ Functions ∨

↗ Maintain Base Calendar Changes

	PAYROLL	Customized Changes Exist	No
Name	Payroll Calender		

Lines

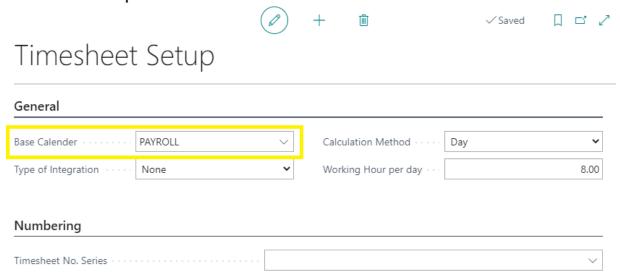| Date ↑	Day ↑	Nonworking	Description
4/23/2021	Friday	☐	
4/24/2021	Saturday	☑	
4/25/2021	Sunday	☑	
4/26/2021	Monday	☐	

Then add the holidays as shown below on the screenshot. Select a day for weekly recurring and date for the annual recurring holiday and also add the description if required.
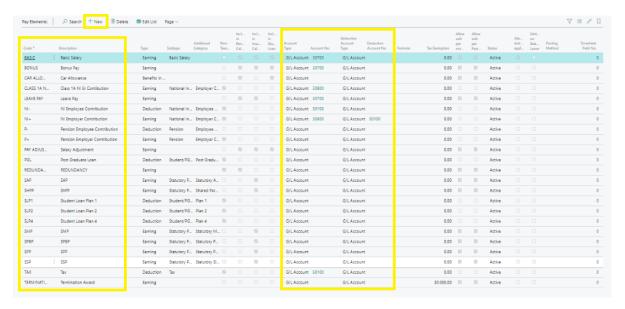
PAYROLL · Payroll Calender   ✓ Saved

Base Calendar Changes | Search   + New   Edit List   Delete   Page

	Recurring System ↑		Date ↑	Day ↑	Description	Nonworking
→	Annual Recurring	⋮	12/25/2020		Christmas Day	☑
	Annual Recurring		1/1/2021		New Year's Day	☑
	Weekly Recurring			Saturday		☑
	Weekly Recurring			Sunday		☑

Then to use this calendar for the holidays' calculation in the payroll system select the base calendar in the **Timesheet Setup**.

Timesheet Setup

General

Base Calender	PAYROLL	Calculation Method	Day
Type of Integration	None	Working Hour per day	8.00

Numbering

Timesheet No. Series	

4. Payroll Elements Setup

Search for the "**Payroll Elements**" in the BC search icon. Then we can view the payroll elements setup where we can define the pay items/elements used for payroll processing like basic pay, bonus, car allowance, insurance, pension, statutory leave payment, termination awards, and many more. Below is a screenshot of some of the pay elements that can be added.

G/L Account mapping of pay elements:

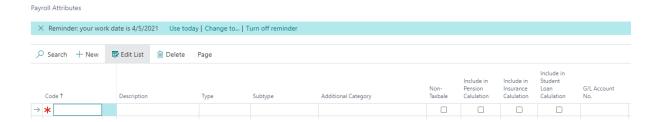| Code	Type	Subtype	Additional Category	Account No.	Deduction Account No.
BASIC	Earning	Basic Salary		Salaries Expense Account	N/A
BONUS	Earning			Salaries Expense Account if you want to show in different G/L then Please create Separate G/L Account	N/A
CAR ALLOWANCE	Benefits In Kind			No G/L Account as benefit in kind will not give financial effect	N/A
CLASS 1A NI+	Earning	National Insurance	Employer Contribution	NIC Employer Contribution Expense Account	Employer NIC Contribution G/L entry will be posted in payable account automatically. Select NIC Payable Account
LEAVE PAY	Earning			Salaries Expense Account if you want to show in different G/L then Please create separate G/L Account	N/A
NI-	Deduction	National Insurance	Employee Contribution	NIC Employee Payable Account (Deduction from Employee)	N/A

NI+	Earning	National Insurance	Employer Contribution	NIC Employer Contribution Expense Account (Addition by Employer)	Employer NIC Contribution G/L entry will be posted in payable account automatically. Select NIC Payable Account
P-	Deduction	Pension	Employee Contribution	Pension Payable Account (Deduction from Employee)	N/A
P+	Earning	Pension	Employer Contribution	Pension Expense Account (Addition by Employer)	Employer Pension Contribution G/L entry will be Posted in payable account automatically. Select Pension Payable Account
PAY ADJUSTMENT	Earning			Salaries Expense Account if you want to show in different G/L then Please create separate G/L Account	N/A
PGL	Deduction	Student/PG Loan	Post Graduate	Student loan Payable Account (Deduction from Employee)	N/A
REDUNDANCY	Earning			Salaries Expense Account if you want to show in different G/L then Please create separate G/L Account	N/A
SAP	Earning	Statutory Payment	Statutory Adoption Pay - SAP	Statutory payment Expenses Account	N/A
SHPP	Earning	Statutory Payment	Shared Parental Pay - ShPP	Statutory payment Expenses Account	N/A
SLP1	Deduction	Student/PG Loan	Plan 1	Student loan Payable Account (Deduction from Employee)	N/A
SLP2	Deduction	Student/PG Loan	Plan 2	Student loan Payable Account (Deduction from Employee)	N/A
SLP4	Deduction	Student/PG Loan	Plan 4	Student loan Payable Account (Deduction from Employee)	N/A
SMP	Earning	Statutory Payment	Statutory Maternity Pay - SMP	Statutory payment Expenses Account	N/A
SPBP	Earning	Statutory Payment	Statutory Parental Bereavement Pay - SPBP	Statutory payment Expenses Account	N/A
SPP	Earning	Statutory Payment	Statutory Paternity Pay - SPP	Statutory payment Expenses Account	N/A
SSP	Earning	Statutory Payment	Statutory Sick Pay - SSP	Statutory payment Expenses Account	N/A

| TAX | Deduction | Tax | | Tax Payable (Deduction from employee) | N/A |
| TERMINATION | Earning | | | Termination Award Expense Account | N/A |

Note:- Account No. can be G/L Account No., Vendor No. depends upon Account type Selected.

To add a new pay element, the user can click on ➕ New icon as shown in the below screenshot and fill in the code, description. Select relevant type, subtype, and additional category from the dropdown list. Users can classify whether the pay elements will be taxable or will be included in insurance calculation, pension calculation, student loan calculation, etc. using the check box shown in the screenshot.

Below is the screenshot of few pay items/elements that has been added.

5. Pay Element Field Configuration

"**Pay Element Field Configuration**" setup is to set up a column/fields as per the pay elements create in the "Pay Elements" setup. Need to select the table and field no. along with the "Pay element" code in the pay element field configuration. As shown in the below screenshot. The pay elements that are added in this setup will show as a column in the "Payroll Batch" which will be used for the payroll processing.

6. Payroll Fiscal Year

Here we can define the Fiscal Year for payroll and select the active fiscal year.

Fiscal Year ↑		Start Date	End Date	Active
2020/2021	⋮	06/04/2020	05/04/2021	☑
2021/2022	⋮	06/04/2021	05/04/2022	☐

7. Payroll Tax Area

Define the payroll tax area like England, Scotland, and Wales here and also define the tax prefix that will be used in the tax code.

Code ↑		Description	Tax Prefix
ENGLAND	⋮	England & Northern Ireland	
SCOTLAND		Scotland	S
WALES		Wales	C

8. Pay Levels

To open pay levels, Go to Role center page of "Payroll Processer" and from the menu navigate to "Pay Level" as shown in the screen shot below. Then define salary levels like Junior, Senior, etc as shown below.

9. Pay Grades

Similarly, as Pay Level, navigate to "Pay Grades" and then define Grades in here as shown be below.

10. Grade Level Combination

Define the basic salary using a combination of levels and grades.

11. Tax Setup

Similarly, as Pay Level, navigate to Tax setup from the menu in the payroll processor role center as show in screen shot below. Then define the tax setup along with the tax area code, fiscal year, effective dates, and tax brackets and rates.

Tax Configuration Card | Work Date: 4/26/2021   ✎ + 🗑   ✓ Saved ⬈

ENGLAND · 2020/2021

General

Tax Area Code	ENGLAND ⌄		Effective from	4/6/2020 📅
Fiscal Year	2020/2021 ⌄		Effective to	4/5/2021 📅
Description	PAYE Tax Brackets for England			

Tax Configuration Detail | Manage

	Tax Group Code		Start Amount	End Amount	Tax Rate	Tax Code Letters
	BASIC		1.00	37,500.00	20.00	BR
	HIGHER		37,501.00	150,000.00	40.00	D0
→	ADDITIONAL	⋮	150,001.00	99,999,999,999.00	45.00	D1

Tax Configuration Card   ✎ + 🗑   ✓ Saved ⬈

ENGLAND · 2021/2022

General

Tax Area Code	ENGLAND ⌄		Effective from	4/6/2021 📅
Fiscal Year	2021/2022 ⌄		Effective to	4/5/2022 📅
Description	PAYE Tax Brackets for England			

Tax Configuration Detail | Manage

	Tax Group Code		Start Amount	End Amount	Tax Rate	Tax Code Letters
→	BASIC	⋮	1.00	37,700.00	20.00	BR
	HIGHER		37,701.00	150,000.00	40.00	D0
	ADDITIONAL		150,001.00	99,999,999,999.00	45.00	D1

Note: Tax brackets for England, Scotland and Wales are different in two different fiscal year 2020/2021 and 2021/2022.

12.   Pay Frequency

Similarly, navigate to Pay Frequency from the menu in the payroll processor role center as shown in 1st screen of the Tax Setup. Define the pay frequency which may be weekly, biweekly, monthly, etc.

Pay Frequency | Work Date: 30/12/2020   ✓ Saved 🔖 ⬈

🔍 Search + New 📝 Edit List 🗑 Delete Page | Related Fewer options   ▽ ☰

	Code ↑		Description	Frequency	HMRC Pay Frequency	Payment Delay	Annualizing Factor	Monthly Factor
	MONTHLY		Monthly	Monthly	M1 (Calend...	0	Generated P...	1
→	WEEKLY	⋮	Weekly	Weekly	W1 (Weekly)	0	Generated P...	4.33

Then go to pay fiscal year form the menu for the selected pay frequency as shown below.

Then from the action menu open "Generate Pay Periods" as shown below for the selected fiscal year.

Select the pay start date and then generate the pay periods as shown below in the screenshot.

13.   Insurance Setup

13.1.   Insurance Class

Go to Insurance Class and define the insurance class as below in the Class.

Code ↑	Description	Class	Employee NI Attribute Code	Employer NI Attribute Code
→ CLASS 1	Class 1	Class 1	NI-	NI+
CLASS 1A	Class 1 A	Class 1A		CLASS 1A NI+

13.2.   Insurance Categories

Then to define the Insurance Categories for CLASS 1, select the CLASS 1 line and then click on the Insurance Categories action as shown in the screenshot below.

Code ↑	Description	Class	Employee NI Attribute Code	Employer NI Attribute Code
→ CLASS 1	Class 1	Class 1	NI-	NI+
CLASS 1A	Class 1 A	Class 1A		CLASS 1A NI+

Then define the Standard Class 1 insurance categories as shown below.

Class Code	Code ↑	Description
→ CLASS 1	A	All employees apart from those in groups B, C, J, H, M and …
CLASS 1	B	Married women and widows entitled to pay reduced Natio…
CLASS 1	C	Employees over the State Pension age
CLASS 1	H	Apprentice under 25
CLASS 1	J	Employees who can defer National Insurance because they'…
CLASS 1	M	Employees under 21
CLASS 1	X	Insurance not applicable. Under 16
CLASS 1	Z	Employees under 21 who can defer National Insurance bec…

13.3. Insurance Brackets

To define the insurance bracket for the class 1 insurance, select the class 1 line and click on insurance brackets.

Then fill in the insurance brackets for employer and employee and then setup weekly, monthly, yearly, etc. insurance bracket start and end amount as shown below.

13.4. Insurance Rates

Define insurance rates by selecting the insurance category and click on the Insurance rates action.

Then define the insurance rates for the selected insurance category for employer and employee.

Insurance Rates   ✓ Saved   📑 ⬁ ↗

✕ Reminder: your work date is 4/5/2021   Use today | Change to... | Turn off reminder   ⌄

🔍 Search   + New   📝 Edit List   🗑 Delete   Page   ▽ ☰

Class Code ↑ ▽	Insurance Category Code ↑ ▽	Contributor ↑	Fiscal Year ↑	First Limit Rate	Second Limit Rate	Final Limit Rate
→ CLASS 1	A	Employer	2020/2021	0.00	13.80	13.80
CLASS 1	A	Employee	2020/2021	0.00	12.00	2.00

13.5.   NI Attributes for Class 1A

This setup is to define the pay items/attributes that will be subjected to Class 1A insurance deduction.

Insurance Class   📑 ⬁ ↗

✕ Reminder: your work date is 4/5/2021   Use today | Change to... | Turn off reminder   ⌄

🔍 Search   + New   📝 Edit List   🗑 Delete   📘 Insurance Brackets   📖 NI Class Attributes   🗂 Insurance Categories   Page   ▽ ☰

Code ↑	Description		Class	Employee NI Attribute Code	Employer NI Attribute Code
CLASS 1	Class 1		Class 1	NI-	NI+
→ CLASS 1A	Class 1 A		Class 1A		CLASS 1A NI+

Select Class 1A insurance class and click on the NI Class Attributes as shown above. Then add the attribute will are liable for the class 1A insurance deduction like termination award. Then select the threshold (tax-free amount) and insurance rates.

NI Class Attributes   ✓ Saved   📑 ⬁ ↗

✕ Reminder: your work date is 4/5/2021   Use today | Change to... | Turn off reminder   ⌄

🔍 Search   + New   📝 Edit List   🗑 Delete   Page   ▽ ☰

Class ↑ ▽	Attribute Code ↑	Threshold	Rates	Sub Type
→ CLASS 1A	TERMINATION	30,000.00	13.80	Termination/Sporting Aw...

14.   Pension

14.1.   Pension Sets

Pension Set can be defined here. We can define pension set as required and apply on the basis of the earning type i.e. Basic earnings, Qualifying earnings, or Total earnings. The start and end bracket amount needs to be defined in the case of the Qualifying earnings.

Note: As per the company policy, there might be both the fixed pension amount and pension rate applicable.

14.2.   Pension Rates

To define pension rates, select the pension set and then click on the Pension Rates action.

Add the pension rates for employer and employee contributions.

To define fixed pension rates and fixed pension amount, select the pension set except Set A, Set B, Set C and then click on the Pension Rates action.

Add the pension rates for employer and employee contributions.

Note: If you want to add pension amount then choose the type as Fixed Amount and if you want to add pension rate then choose the type as Percentage.

15.   Student Loan

15.1.   Student Loan Setup

16.   Statutory Payments/Leave

Search for "**Statutory Leave**" in the search bar and add all kinds of Statutory Payments/Leaves as shown in the screenshot below.

CRONUS UK Ltd. | Employees ∨   Setup ∨   Processing ∨   History ∨ | ≡

Statutory Payments/Leave: All ∨   🔍 Search   + New   🗑 Delete   📄 Edit List   📄 Policies   Page ∨

Code	Description
SAP	Statutory Adoption Pay - SAP
SHPP	Shared Parental Pay - ShPP
SMP	Statutory Maternity Pay - SMP
SPBP	Statutory Parental Bereavement Pay - SPBP
SPP	Statutory Paternity Pay - SPP
SSP	Statutory Sick Pay - SSP

Then select the statutory payment/leave and define the policies by clicking on the Policies action on the menu.

Statutory Leave Policy | Work Date: 4/5/2021

🔍 Search   + New   Manage   Page

Statutory Code	Fiscal Year	Description	Active	HMRC
SPP	2020/2021	SPP Policy for 2020/2021.	☑	☑

Then open the policies Card page and fill in all the details related to the selected statutory leave.

SLG Statutory Leave Policy | Work Date: 4/5/2021   ✎ + 🗑   ✓ Saved

3

General

Fiscal Year	2020/2021	Active	⬤
Statutory Code	SPP	HMRC	⬤
Description	SPP Policy for 2020/2021.		

Eligibility Criteria

Applicable to	Male	Relevant Period in Weeks for AWE Asses...	0.00
Min. Week Employment	0.00	Notice Required	◯
Min. Average Weekly Earning	10.00		

Entitlement

Max No. of Weeks it can be paid for	1.00	Max no. of weeks paid at Average Weekl...	0.00
Standard Weekly Rate	151.20	Lower of SR or x% of AWE	90.00

17.   HMRC Setup

This setup is for the integration of EPS and FPS integration with HMRC. Search for "**HMRCS Setup**" in the search box and just fill in the required information here for the integration to work.

In the **Employer Details Tab,** fill in the Employer details like Sender id, Password, HMRC office no., Employer PAYE Reference no., AO Reference, CO Tax Ref., etc. as shown below in the screenshot.

HMRC Setup

Employer Details

Sender ID	••••••••	Originator Sort Code	
Password	••••••••	Employment Allowan...	4,000.00
Sender Type	Employer	Employer Sector	Industrial
HMRC Office Number	635	State Aid rules donot ...	⬜
Employer Paye Refere...	A635	Annual Levy Allowanc...	0.00
AO Reference	635PC00000000	Auto Submit FPS	⬤
CO Tax Ref	1111111111	Disable Bulk FPS Sub...	⬜

Note: If **Auto Submit FPS** is enabled, FPS submission will be automated and if **Disable Bulk FPS submission** is enabled, employee wise FPS will be submitted.

In **Bank Details Tab,** fill in the bank details like Bank Account Name, Bank Account No., Bank Branch No., and Building Society Reference Value (If any).

In **Product Details tab,** product details like Envelope Version, Vendor ID, Product. URI and Version are auto updated.

And select the no. series in the **Numbering tab** so that automatic no. series of EPS is generated while submitting EPS to HMRC.

HMRC Setup

Employer Details >

Bank Details

Bank Account Name	test 1234	Bank Branch No.	123456
Bank Account No.	87654321	Building Society Refer...	

Product Details

Envelope Version	2.0	Version	1.0
Vendor ID		Enable Bacs Payment	(toggle off)
Product	SiriusPayroll365	Enable Test in Live	(toggle off)
URI	8094		

Numbering

EPS Submission No. Series	EPS

Note: If you enable "Enable Bacs Payment" field, the payment to the employees through Bacs method will be auto activated and if you enable "Enable Test in Live" field, it helps to submit FPS and confirm the submission of FPS is successful or not notifying HMRC that the FPS submission is for test purpose.

18. Payroll related setup in Employees

To open the employee card, search for the "**Employees**" in the search bar and open the required employee card from the list. In the employee card, we need to fill in all the information required related to the payroll in the payroll tab for all the employees. This includes salary setups, tax code, and tax areas. Also need to fill the National Insurance Class Code and Insurance Category code and the pensions sets as well. Select the Pay cycle code and pay unit as well.

To define the basic pay and other pay elements for employees go to process, click on "Employee Elements "as shown below.

Add the basic pay, allowance, and more by selecting the pay element code that we create in the "Pay Elements" setup.

Employee Payroll Elements | Work Date: 30/12/2020   ✓ Saved

Search   + New   Edit List   Delete   Page

Code ↑	Type	Subtype	Pay Unit	Formula Exits	Amount	Description
→ BASIC	Earning	Basic Salary		No	2,500	
CAR ALLOWA...	Benefits In Kind			No	50	

To define the student loan, on the employee card go to process and then click on student loan details. Then select the plan code like Plan 1, Plan 2, or Postgraduate loan and mention the Loan start date and loan end date as well.

Student Loan Details   ✓ Saved

✕ Reminder: your work date is 4/5/2021   Use today | Change to... | Turn off reminder

Search   + New   Edit List   Delete   Page

Employee Code ↑	Plan Code ↑	Loan Start Date	Loan End Date
→ AH	SLP1	11/3/2020	11/9/2022

USER GUIDE

1. [How-To] Setup Employee

1. Open Employee list

2. Click on New Action

3. Fill the General Information

General   Show less

No.	TAX1	Search Name	JIMMY RESTOF-UK
First Name	Jimmy	Gender	Male
Middle Name		Company Phone No.	
Last Name	Restof-UK	Company Email	
Job Title	Production Planner	Last Date Modified	12/11/2020
Initials		Privacy Blocked	

4. Fill the relevant information on Payment Fast-tab
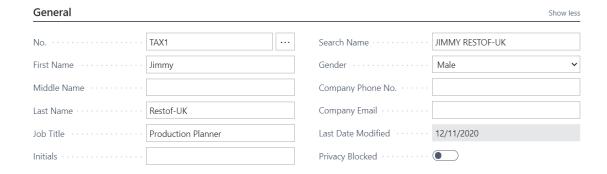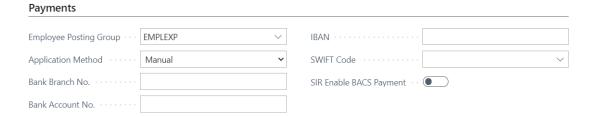
Payments

Employee Posting Group	EMPLEXP	IBAN	
Application Method	Manual	SWIFT Code	
Bank Branch No.		SIR Enable BACS Payment	
Bank Account No.			

5. Now click on "Verify Employee Details" which you can find under "Process" Action Group.

Employee Card | Work Date: 5/6/2020

TAX1 · Jimmy · Restof-UK

Process   Report   Employee   Navigate | More options

Verify HMRC Details   Add Car Benefits   Pay Employee   Employee Elements   Student Loan

6. This will open all the fields required as per HMRC compliances. Following are the different fast-tabs that include different fields. Fill up all the relevant as per the employee details you have.

Verify Employee Details

✓ Saved

TAX1 · Jimmy · Restof-UK

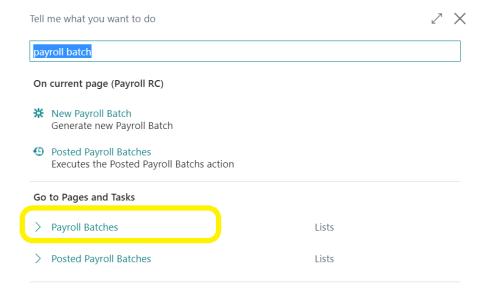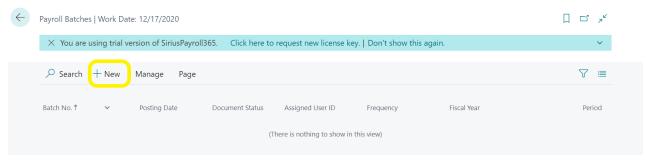| Personal Details >		Jimmy
Employee Identification >		8/14/1985
Employment Details >		
Director Details >		
Starter Details >		1/1/2001
Off Payroll Working Details >		
Payroll >		

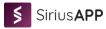## 2. [How-To] Create and Post Payroll Document

To create a payroll document, it's mandatory that you must set up employees and the application. If you have chosen to use "HMRC Settings" during the configuration, you are ready to use the application. Setting up different areas of Payroll is covered in the Administration sections.

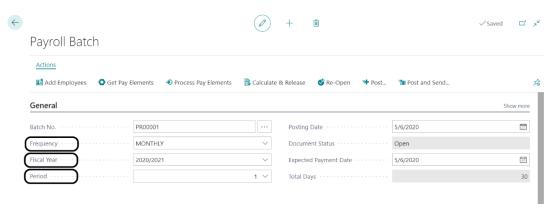1. Search and open the Payroll Batch page.

Tell me what you want to do

payroll batch

On current page (Payroll RC)

✳ New Payroll Batch
Generate new Payroll Batch

↻ Posted Payroll Batches
Executes the Posted Payroll Batchs action

Go to Pages and Tasks

> Payroll Batches   Lists

> Posted Payroll Batches   Lists

2. Click on New to create a new document.

← Payroll Batches | Work Date: 12/17/2020

✕ You are using trial version of SiriusPayroll365.   Click here to request new license key. | Don't show this again.

🔍 Search   + New   Manage   Page

Batch No. ↑	∨	Posting Date	Document Status	Assigned User ID	Frequency	Fiscal Year	Period

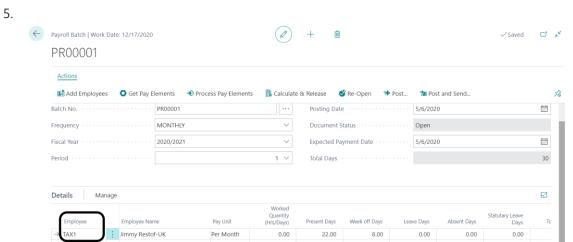(There is nothing to show in this view)

3. Document No. will be populated automatically. Select the periods for which you want to run the payroll as shown below.

4. Now, you can either use Import Employee action to import the employees or use the details as shown below to enter the employees. Below entered employees are sample employees which are created in the sandbox.

5.

6. You can use the Subscription fast-tab to see how many subscriptions you will require to post this document this month.

7. Now if your purchased subscription is enough you can now click on the following actions in sequence.
   - Get Pay Elements: This will fetch the attributes amounts for each employee.
   - Process Pay Elements: This will process and calculate the amount for the attributes which need calculations for example: National Insurance.
   - Calculate & Release: This action will calculate total earnings, deductions, net pays, and tax for each employee in this document.
8. Now you can click on Post to generate the appropriate entries in general ledger entries and payroll ledger entries. If you select Post & Send action, it will post the document and will send the pay-slip to individual employees.

If you need any assistance feel free to reach us

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