



Sirius  
Payroll365

# SiriusPayroll365 Setup Guide



SiriusAPP

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.



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[www.siriusapp.co.uk](http://www.siriusapp.co.uk)



DogmaGroup



SeeLOGiC  
Part of the Dogma Group

The *strategy*  
of the group



SeeLOGiC  
International

The *engine*  
of the group



SiriusAPP

The *creativity*  
of the group



DynamicAI

The *insights*  
of the group

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# 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 also 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”**.

**Edit - My Settings**

Role ..... Payroll Processor

Company ..... CRONUS UK Ltd.

Work Date ..... 5/6/2020

Region ..... English (United States)

Language ..... English (United States)

Time Zone ..... (UTC+05:45) Kathmandu

Notifications ..... Change when I receive notifications.

Your last sign in was on 12/15/20 10:41 AM.

OK Cancel

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

CRONUS UK Ltd. | Employees ▾ | Setup ▾ | Processing ▾ | History ▾ | Setup & Extensions ▾ | ☰

✕ The SiriusPayroll365 extension has been installed but not configured. [Click here to configure.](#)

Headline

Hi, MOD Administrator!

Actions

+ New Employee + New Payroll Batch > Reports > History

Payroll Activities

Payroll					Tax		National Insurance Contribution		Pension Contribution	
Days to Payday	Total no. of Employees	Previous Period's Payroll	Current Period's Payroll	Payroll Year to Date	Tax this Period	Total Tax Year to Date	NIC this Period	NIC Year to Date	Pension this Period	Pension Year to Date
0	10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Insights

Power BI Reports ▾

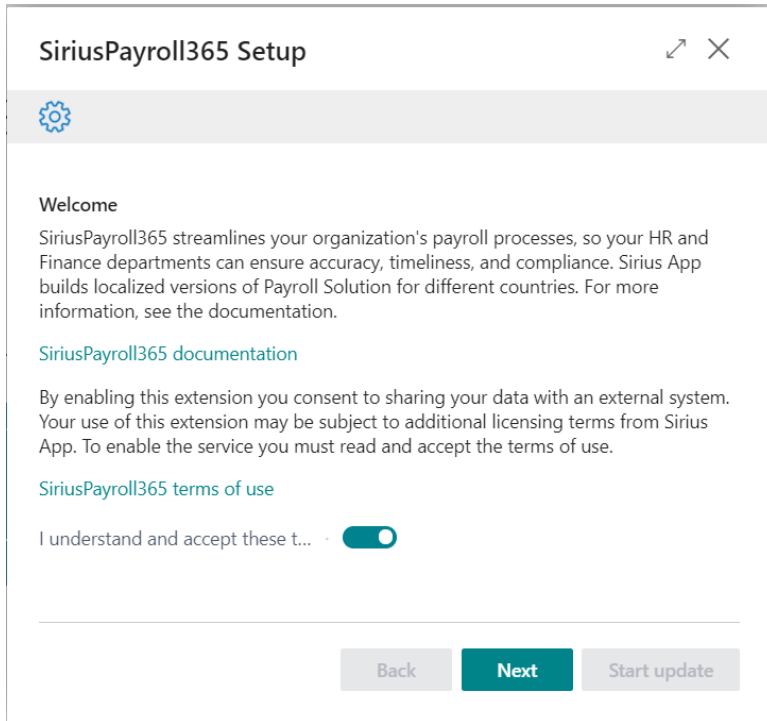
Get started with Power BI

Report Inbox ▾

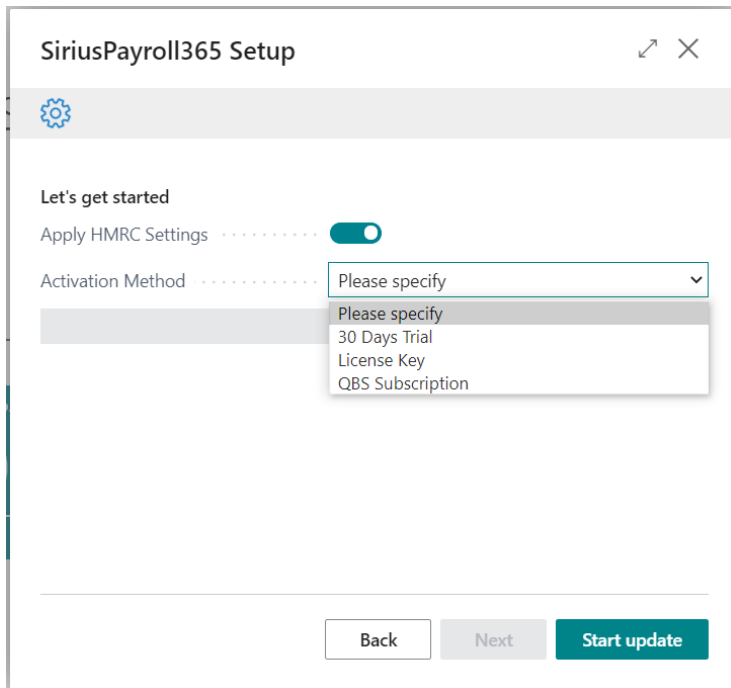
Created Date-Time ↓	Description	Output Type
(There is nothing to show in this view)		

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. 30 Days trial option is for sandbox testing. License Key and 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. 30 Days Trial

This option can be selected only in a sandbox environment. It will allow you to test the payroll features for 30 days. You will get 3 employee subscription for testing. That means you can create and post the payroll only for 3 employees per month.

#### SiriusPayroll365 Setup ↗ ✕



**Let's get started**

Apply HMRC Settings

Activation Method

30 Days Trial option can be selected only on the sandbox environment.

[Essential Experience](#) / [Sample Data](#) / [Setup Data](#)

Get the Essential functionality scope containing everything you need to evaluate SiriusPayroll365 for 30 days.

Included:

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

---

[Back](#) [Next](#) [Start update](#)

## 2. License Key


This option can be selected only on a production environment. If you select this option, the program will show you the following details.


### SiriusPayroll365 Setup ↗ ✕

Fill in the details if you have purchased the License Key from Sirius Apps Ltd.

License Key ..... \*

Subscription per month ..... \*

Activation Date ..... \*  

Expiry Date ..... \*  

[Request new license key?](#)


If you do not have the License Key and other details, please click on "Request new license key?" to get those details and email the details directly to [sales@siriusapp.co.uk](mailto:sales@siriusapp.co.uk)

Advanced Experience / Setup Data

Get the Advanced functionality scope containing everything you need to start using SiriusPayroll365. If you have already purchased the license, please enter the license key and click on Start update.

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If you have already purchased a License Key from Sirius App Ltd, then you can enter the details on the above screen, else you need to contact, [sales@siriusapp.co.uk](mailto:sales@siriusapp.co.uk). The sales team at Sirius app will need few details about your business central tenant. So, to get those details please click on the **"Request new license key"** action shown above. And email those detail directly to [sales@siriusapp.co.uk](mailto:sales@siriusapp.co.uk) Following is the sample message when you click on the "Request new license key?" link.

 Thank you for using SiriusPayroll365, Please 'copy and paste' this information and send it to [sales@siriusapp.co.uk](mailto:sales@siriusapp.co.uk) to obtain a new license key

Tenant ID: 571e5b68-4408-4920-94f7-131a12e0b81c  
Domain Name: M365x214134.onmicrosoft.com  
Environment Name: qa  
Is Production: No  
Company Name: CRONUS UK Ltd.  
Product Code: SP365GB

### 3. 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.

The screenshot shows the 'User Personalisation Card' for a user named 'ADMIN'. The card has a title bar with a back arrow, the title 'User Personalisation Card', and icons for edit, add, and delete. A 'Saved' status is shown on the right. Below the title bar is a notification bar: 'Reminder: your work date is 30/12/2020 Use today | Change to... | Turn off reminder'. Below the notification bar are tabs: 'Clear Personalised Pages', 'Actions', 'Related', and 'Fewer options'. The main content area is titled 'General' and contains several settings:

User ID	ADMIN	Locale ID	2057
Profile ID	SIR PAYROLL PROCESSOR	Time Zone	Nepal Standard Time
Language ID	2057	Company	CRONUS UK Ltd.

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.



Headline

Actions

+ New Employee + New Payroll Batch > Reports > History

# Want to learn more about Business Central?

○ ●

## Payroll Activities

Payroll					Tax		National Insurance Contribution		Pension Contribution
Days to Payday	Total no. of Employees	Previous Period's Payroll	Current Period's Payroll	Payroll Year to Date	Tax this Period	Total Tax Year to Date	NIC this Period	NIC Year to Date	Pension this Period
-5	10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

## Insights

Power BI Reports ▾

Get started with Power BI



Report Inbox ▾

Created Date-Time ↓	Description
(There is nothing to show in this view)	

## 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.

←
✎ + 🗑
✓ Saved 📌 🔄 ↶

## Payroll Setup

---

License

### General

Payroll Fiscal Year Start Date ..... 01/01/2001 <input type="text"/>	Tax Calculation Type ..... Yearly <input type="text"/>
Payroll Fiscal Year End Date ..... 01/01/2022 <input type="text"/>	Make Payroll Slip Confidential ..... <input checked="" type="checkbox"/>
Posting Method ..... Employee Wise <input type="text"/>	Total Days ..... 0.00 <input type="text"/>
Pay Deduction Basis on Leave ..... Per Working Days <input type="text"/>	Skip Posting to G/L ..... <input type="checkbox"/>

### Employer Details

HMRC Office No. .... 635 <input type="text"/>	Self Assessment Unique Tax Ref ... <input type="text"/>
Employer PAYE Reference ..... A635 <input type="text"/>	Corporation Tax Reference ..... <input type="text"/>
Employer Accounts Office Refe... .. <input type="text"/>	Employment Allowance Claim L... .. 0.00 <input type="text"/>

### Posting Group

Net Payable Account Type ..... G/L Account <input type="text"/>	Net Payable Account Code ..... 51600 <input type="text"/>
---	---

### Payment Attribute Group >

### Numbering

Payroll Batch No. Series ..... PAY <input type="text"/>	Leave Entitlement No. Series ..... <input type="text"/>
Payroll Batch Posting No. Series ... PAY+ <input type="text"/>	

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

License

### General

Payroll Fiscal Year Start Date ..... 01/01/2001 <input type="text"/>	Tax Calculation Type ..... Yearly <input type="text"/>
Payroll Fiscal Year End Date ..... 01/01/2022 <input type="text"/>	Make Payroll Slip Confidential ..... <input checked="" type="checkbox"/>
Posting Method ..... Employee Wise <input type="text"/>	Total Days ..... 0.00 <input type="text"/>
Pay Deduction Basis on Leave ..... Per Working Days <input type="text"/>	Skip Posting to G/L ..... <input type="checkbox"/>

### Employer Details

HMRC Office No. .... 635 <input type="text"/>	Self Assessment Unique Tax Ref ... <input type="text"/>
Employer PAYE Reference ..... A635 <input type="text"/>	Corporation Tax Reference ..... <input type="text"/>

Similarly, in the **Employer Details Tab**, fill in the Employer details like HMRC office no., Employer PAYE Reference no. etc. as shown below in the screenshot.

### Employer Details

HMRC Office No. ....	<input type="text" value="635"/>	Self Assessment Unique Tax R... .	<input type="text"/>
Employer PAYE Reference . . . . .	<input type="text" value="A635"/>	Corporation Tax Reference . . . . .	<input type="text"/>
Employer Accounts Office Ref... .	<input type="text"/>	Employment Allowance Clai... .	<input type="text" value="0.00"/>

Similarly, fill the **Posting group** tab and **Payment attributes 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.

### Posting Group

Net Payable Account Type . . . . .	<input type="text" value="G/L Account"/>	Net Payable Account Code . . . . .	<input type="text" value="51600"/>
------------------------------------	--	------------------------------------	------------------------------------

### Payment Attribute Group

Bal. Account Type . . . . .	<input type="text" value="G/L Account"/>	Payroll Journal Template . . . . .	<input type="text" value="GENERAL"/>
Bal. Account No. . . . .	<input type="text" value="30700"/>	Payroll Journal Batch . . . . .	<input type="text" value="DEFAULT"/>

### Numbering

Payroll Batch No. Series . . . . .	<input type="text" value="PAY"/>	Leave Entitlement No. Series . . . . .	<input type="text"/>
Payroll Batch Posting No. Series . . . . .	<input type="text" value="PAY+"/>		

### 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 🔖 📄 ↗

✕ 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
<a href="#">PAYROLL</a>	Payroll Calendar	<input type="checkbox"/>

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 ✎ + 🗑 ✓ Saved 📄 ↗

PAYROLL · Payroll Calendar

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

**Actions** Related

⚡ Functions ▾

✎ Maintain Base Calendar Changes

Code: PAYROLL Customized Changes Exist: No

Name: Payroll Calendar

---

Lines 📄

Date ↑	Day ↑	Nonworking	Description
4/23/2021	Friday	<input type="checkbox"/>	
4/24/2021	Saturday	<input checked="" type="checkbox"/>	
4/25/2021	Sunday	<input checked="" type="checkbox"/>	
4/26/2021	Monday	<input type="checkbox"/>	

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 Calendar ✓ Saved 📄 ↗

Base Calendar Changes | 🔍 Search + New **Edit List** 🗑 Delete Page 🔍 ☰

Recurring System ↑	Date ↑	Day ↑	Description	Nonworking
→ Annual Recurring	12/25/2020		Christmas Day	<input checked="" type="checkbox"/>
Annual Recurring	1/1/2021		New Year's Day	<input checked="" type="checkbox"/>
Weekly Recurring		Saturday		<input checked="" type="checkbox"/>
Weekly Recurring		Sunday		<input checked="" type="checkbox"/>

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



✓ Saved



# Timesheet Setup

## General

Base Calendar ..... 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.

Code	Description	Type	Subtype	Additional Category	Incl. in Pen. Cal.	Incl. in Insu. Cal.	Incl. in Stu. Loan	Account Type	Account No.	Deduction Account Type	Deduction Account No.	Formula	Tax Exemption	Allow edit per em...	Allow edit per Payr...	Status	Abs... ded... appl...	Ded... on Stat... Leave
→ BASIC	Basic Salary	Earning	Basic Salary		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	G/L Account	30700	G/L Account			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BONUS	Bonus Pay	Earning			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	G/L Account	30700	G/L Account			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
CAR ALLO...	Car Allowance	Benefits In ...			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	G/L Account		G/L Account			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
CLASS 1A ...	Class 1A NI Er Contribution	Earning	National In...	Employer C...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account	30700	G/L Account	51700		0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
LEAVE PAY	Leave Pay	Earning			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	G/L Account	30700	G/L Account			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
NI-	NI Employee Contribution	Deduction	National In...	Employee ...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account	51700	G/L Account			0.00	<input type="checkbox"/>	<input type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
NI+	NI Employer Contribution	Earning	National In...	Employer C...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account	30700	G/L Account	51700		0.00	<input type="checkbox"/>	<input type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
P-	Pension Employee Contribu...	Deduction	Pension	Employee ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account	51800	G/L Account			0.00	<input type="checkbox"/>	<input type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
P+	Pension Employer Contribu...	Earning	Pension	Employer C...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account	30700	G/L Account	51800		0.00	<input type="checkbox"/>	<input type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
PAY ADJUS...	Salary Adjustment	Earning			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	G/L Account	30700	G/L Account			0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
PGL	Post Graduate Loan	Deduction	Student/PG...	Post Gradu...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account	51700	G/L Account			0.00	<input type="checkbox"/>	<input type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
REDUNDA...	REDUNDANCY	Earning			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	G/L Account	30700	G/L Account			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
SAP	SAP	Earning	Statutory P...	Statutory A...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account	30700	G/L Account			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
SHPP	SHPP	Earning	Statutory P...	Shared Par...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account	30700	G/L Account			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
SLP1	Student Loan Plan 1	Deduction	Student/PG...	Plan 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account	51700	G/L Account			0.00	<input type="checkbox"/>	<input type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
SLP2	Student Loan Plan 2	Deduction	Student/PG...	Plan 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account	51700	G/L Account			0.00	<input type="checkbox"/>	<input type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
SLP4	Student Loan Plan 4	Deduction	Student/PG...	Plan 4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account		G/L Account			0.00	<input type="checkbox"/>	<input type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
SMP	SMP	Earning	Statutory P...	Statutory M...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account	30700	G/L Account			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
SPBP	SPBP	Earning	Statutory P...	Statutory P...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account	30700	G/L Account			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
SPP	SPP	Earning	Statutory P...	Statutory P...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	G/L Account	30700	G/L Account			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
SSP	SSP	Earning	Statutory P...	Statutory Si...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account	30700	G/L Account			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
TAX	Tax	Deduction	Tax		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account	51700	G/L Account			0.00	<input type="checkbox"/>	<input type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>
TERMINATI...	Termination Award	Earning			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account	30700	G/L Account			30,000.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active	<input type="checkbox"/>	<input type="checkbox"/>


### 4.1. G/L Account mapping of pay elements:

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

4.1. Add new pay element.

To add a new pay element, the user can click on  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.

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

Search + New Edit List Delete Page

Code ↑	Description	Type	Subtype	Additional Category	Non-Taxable	Include in Pension Calculation	Include in Insurance Calculation	Include in Student Loan Calculation	G/L Account No.
* [ ]					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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

Code ↑	Description	Type	Subtype	Additional Category	Non-Taxable	Pension Calculation	Insurance Calculation	Loan Calculation	G/L Account No.
BASIC	Basic Salary	Earning	Basic Salary		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	30700
BONUS	Bonus Pay	Earning			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	30800
CAR ALLOWANCE	Car Allowance	Benefits In Kind			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
CLASS 1A NI+	Class 1A NI Er Contibution	Earning	National Insurance	Employer Contribution	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	31300
LEAVE PAY	leave pay	Earning			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	31500
NI-	NI Employee Contribution	Deduction	National Insurance	Employee Contribution	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	56120
NI+	NI Employer Contribution	Earning	National Insurance	Employer Contribution	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	31300

## 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.

**Pay Element Field Configuration** (Work Date: 30/12/2020)

Table No. ↑	Field No. ↑	Variable Field Code
70702583	5501	BASIC
70702583	5503	CAR ALLOWANCE
70702583	5504	BONUS
70702583	5505	TERMINATION
70702583	5506	SLP1
70702583	5507	SLP2
70702583	5508	PGL
70702583	5509	CLASS 1A NI+
70702583	5510	NI-
70702583	5511	NI+
70702583	5512	P-
70702583	5513	P+
70702583	5514	PAY ADJUSTMENT
70702583	5515	SAP
70702583	5516	SHPP

**Payroll Batch** (Work Date: 30/12/2020) PR00001

Batch No.: PR00001  
 Frequency: MONTHLY  
 Fiscal Year: 2020/2021  
 Posting Date: 06/05/2020  
 Posting Description: Salary Plan PR00001

Employee	Employee Name	Basic Salary	Car Allowance	Bonus Pay	Termination Award	Student Loan Plan 1	Student Loan Plan 2	Post Graduate Loan	Class 1A NI Er Contribution	NI Employee Contribution	NI Employer Contribution	Pension Employee Contribution	Pension Employer Contribution
AH	Annette Hill	2,500.00	50.00	0.00	0.00	0.00	0.00	0.00	0.00	204.96	243.98	101.50	60.90

## 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
→ <u>2020/2021</u>	06/04/2020	05/04/2021	<input checked="" type="checkbox"/>
2021/2022	06/04/2021	05/04/2022	<input type="checkbox"/>

## 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.

← Payroll Tax Area

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

Code ↑	Description	Tax Prefix
→ <u>ENGLAND</u>	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.

CRONUS UK Ltd. | Employees ▾ **Setup** ▾ Processing ▾ History ▾ Setup & Extensions ▾ | ≡

**Payroll Setups** ▾ Insurance ▾ Pension ▾ Student Loan ▾ Statutory Payments/Leave ▾ HMRC Integration ▾ Timesheet Setups ▾ HR Setups ▾

- Payroll Setup
- Pay Grades
- Pay Levels**
- Grade Level Combination
- Pay Elements
- Pay Element Column Configuration
- Payroll Fiscal Year
- Payroll Tax Area
- Tax Setup
- Pay Frequency

Pay Levels - Dynamics 365 Business Central

businesscentral.dynamics.com/571e5b68-4408-4920-94f7-131a12e0b81c/QA?node=0436...

Contoso Electronics | Dynamics 365 Business Central | qa

CRONUS UK Ltd. | < Employees ▾ **Setup** ▾ Processing ▾ History ▾ Setup & Ext

Payroll Setups ▾ Pension ▾ Statutory Payments/Leave ▾ Timesheet Setups ▾  
Insurance ▾ Student Loan ▾ HMRC Integration ▾ HR Setups ▾

Pay Levels: All ▾ | Search + New Delete Edit List Page ▾

Code ↑	Description
JR	Junior
SR	Senior

Insights

## 9. Pay Grades

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

CRONUS UK Ltd. | Employees ▾ **Setup** ▾ Processing ▾ History ▾ Setup & Extensions ▾ | ≡

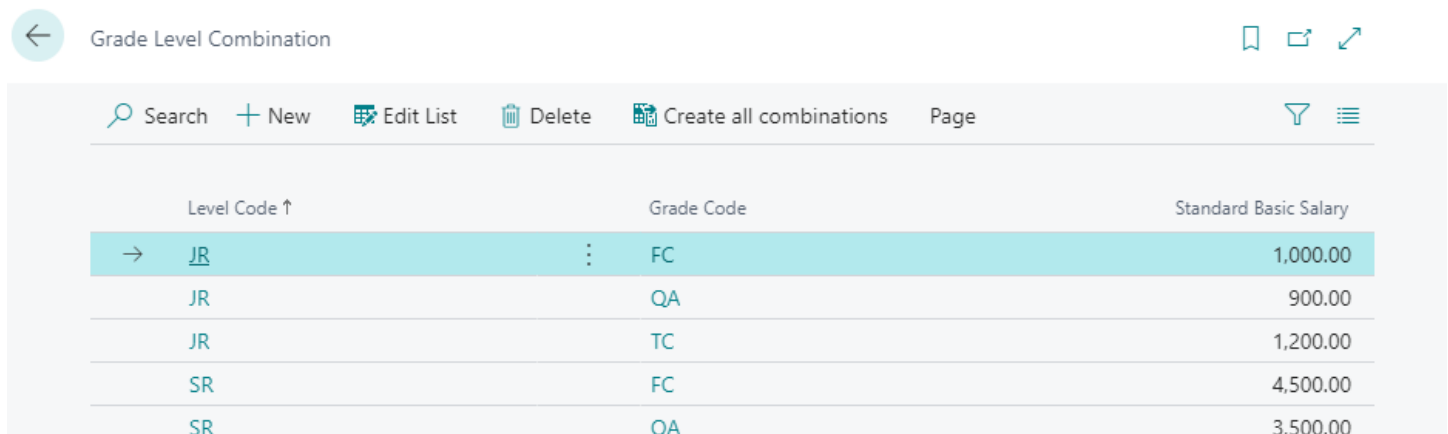
Payroll Setups ▾ Pension ▾ Statutory Payments/Leave ▾ Timesheet Setups ▾  
Insurance ▾ Student Loan ▾ HMRC Integration ▾ HR Setups ▾

Pay Grades: All ▾ | Search + New Delete Edit List Page ▾

Code ↑	Description
EC	Functional Consultant
QA	Quality Analyst
TC	Technical Consultant

## 10. Grade Level Combination

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



Level Code ↑	Grade Code	Standard Basic Salary
→ JR	FC	1,000.00
JR	QA	900.00
JR	TC	1,200.00
SR	FC	4,500.00
SR	QA	3,500.00

## 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.

- Payroll Setup
- Pay Grades
- Pay Levels
- Grade Level Combination
- Pay Elements
- Pay Element Column Configuration
- Payroll Fiscal Year
- Payroll Tax Area
- Tax Setup**
- Pay Frequency

Learn more about  
Central?

Actions  
[+ New Employee](#) [+ New Payroll Batch](#) [> Reports](#) [> History](#)

Previous Period's Payroll			Current Period's Payroll		Payroll Year to Date		Tax		National Insurance Contribution		Pension Co
Previous Period's Payroll	Current Period's Payroll	Payroll Year to Date	Tax this Period	Total Tax Year to Date	NIC this Period	NIC Year to Date	Pension th Period				
0.00	0.00	0.00	0.00	0.00	0.00	243.98	0.0				

Insights

Tax Setup: All ▾ | 🔍 Search | + New | 🗑 Delete | 🛠 Edit List | Page ▾

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

Tax Area Code	Fiscal Year	Description	Effective from	Effective to
ENGLAND	2020/2021	PAYE Tax Brackets for England	4/6/2020	4/5/2021
SCOTLAND	2020/2021	PAYE Tax Brackets for Scotland	4/6/2020	4/5/2021
WALES	2020/2021	PAYE Tax Brackets for Wales	4/6/2020	4/5/2021

Tax Setup Card



✓ Saved



# ENGLAND · 2020/2021

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

## General

Tax Area Code	<input type="text" value="ENGLAND"/>	Effective from	<input type="text" value="4/6/2020"/>
Fiscal Year	<input type="text" value="2020/2021"/>	Effective to	<input type="text" value="4/5/2021"/>
Description	<input type="text" value="PAYE Tax Brackets for England"/>	Special Tax Exempt %	<input type="text" value="0.00"/>

## Tax Setup Subform

Manage



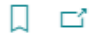
Tax Group Code	Start Amount	End Amount	Tax Rate	Tax Code Letters
→ BASIC	1.00	37,500.00	20.00	BR
HIGHER	37,501.00	150,000.00	40.00	D0
ADDITIONAL	150,001.00	99,999,999,999.00	45.00	D1

## 12. Pay Frequency

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

Pay Frequency | Work Date: 30/12/2020

✓ Saved



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.

Pay Frequency | Work Date: 30/12/2020

✓ Saved



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

Pay Fiscal Year | Work Date: 30/12/2020

✓ Saved

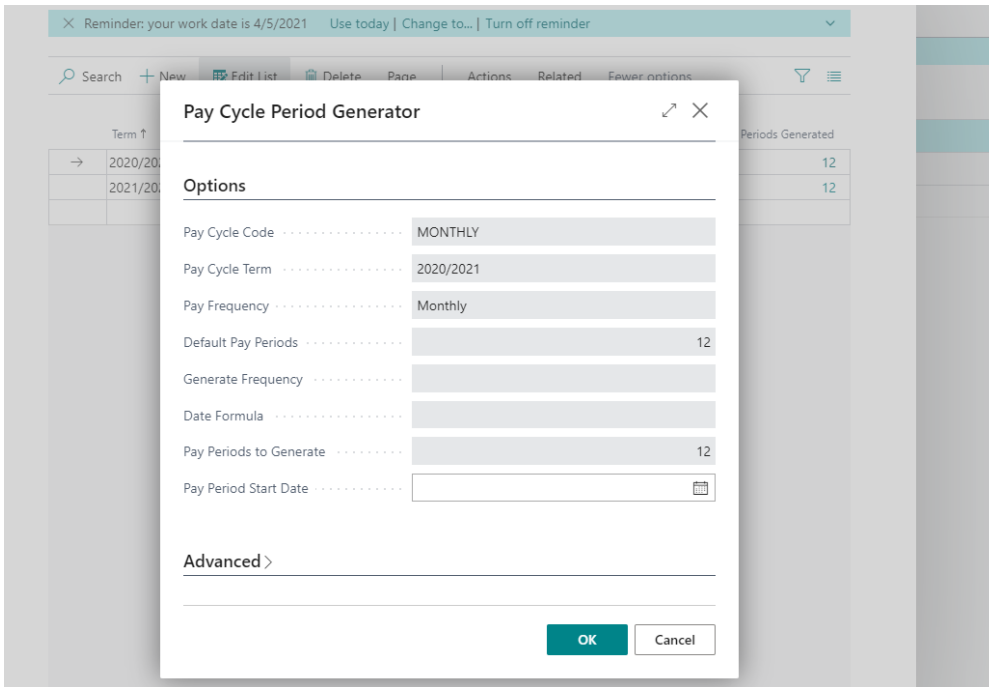


Code ↑	Description	Frequency	HMRC Pay Frequency	Payment Delay	Annualizing Factor	Monthly Factor
→ MONTHLY	Monthly	Monthly	M1 (Calend...	0	Generated P...	1
WEEKLY	Weekly	Weekly	W1 (Weekly)	0	Generated P...	4.33

Code ↑	Description	Frequency	HMRC Pay Frequency	Payment Delay	Annualizing Factor	Monthly Factor
2021/2022				12		12
				12		12

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.

Insurance Class 🔖 📧 ↗

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

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.

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+

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

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

Search + New Edit List Delete Insurance Brackets Insurance Rates Page

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.

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 ...

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 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.

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

🔍 Search + New  Edit List  Delete Page  

Class Code ▼	Contributor	Fiscal Year	Type	Pay Frequency ↑	Start Amount	End Amount
→ CLASS 1	Employer	2020/2021	First Limit Rate	Weekly	120.00	169.00
CLASS 1	Employer	2020/2021	Second Limit Rate	Weekly	169.00	962.00
CLASS 1	Employer	2020/2021	Final Limit Rate	Weekly	962.00	999,999,999.00
CLASS 1	Employee	2020/2021	First Limit Rate	Weekly	120.00	183.00
CLASS 1	Employee	2020/2021	Second Limit Rate	Weekly	183.00	962.00
CLASS 1	Employee	2020/2021	Final Limit Rate	Weekly	962.00	999,999,999.00
CLASS 1	Employer	2020/2021	First Limit Rate	BiWeekly	240.00	338.00
CLASS 1	Employer	2020/2021	Second Limit Rate	BiWeekly	338.00	1,924.00
CLASS 1	Employer	2020/2021	Final Limit Rate	BiWeekly	1,924.00	999,999,999.00
CLASS 1	Employee	2020/2021	First Limit Rate	BiWeekly	240.00	366.00
CLASS 1	Employee	2020/2021	Second Limit Rate	BiWeekly	366.00	1,924.00
CLASS 1	Employee	2020/2021	Final Limit Rate	BiWeekly	1,924.00	999,999,999.00
CLASS 1	Employer	2020/2021	First Limit Rate	Monthly	520.00	732.00
CLASS 1	Employer	2020/2021	Second Limit Rate	Monthly	732.00	4,167.00
CLASS 1	Employer	2020/2021	Final Limit Rate	Monthly	4,167.00	999,999,999.00
CLASS 1	Employee	2020/2021	First Limit Rate	Monthly	520.00	792.00
CLASS 1	Employee	2020/2021	Second Limit Rate	Monthly	792.00	4,167.00
CLASS 1	Employee	2020/2021	Final Limit Rate	Monthly	4,167.00	999,999,999.00

### 13.4. Insurance Rates

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

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

🔍 Search + New  Edit List  Delete  Insurance Brackets  Insurance Rates Page  

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

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

✕ 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	NI Class Attributes Code	Employee NI Attribute	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.

Code ↑	Description	Earning Type	Start Amount	End Amount	Calculation Basis
SET A	Set A	Basic Earnings	0.00	0.00	Cumulative
SET B	Set B	Qualifying Earnings	6,240.00	50,004.00	Non-Cumulative
SET C	Set C	Total Earnings	0.00	0.00	Cumulative

### 14.2. Pension Rates

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

Code ↑	Description	Earning Type	Start Amount	End Amount	Calculation Basis
SET A	Set A	Basic Earnings	0.00	0.00	Cumulative
SET B	Set B	Qualifying Earnings	6,240.00	50,004.00	Non-Cumulative
SET C	Set C	Total Earnings	0.00	0.00	Cumulative

Add the pension rates for employer and employee contributions.

Fiscal Year ↑	Contributor ↑	Pension Set ↑ ▼	Rate
→ 2020/2021	Employer	SET A	4.00
2020/2021	Employee	SET A	5.00

## 15. Student Loan

### 15.1. Student Loan Setup

Student Loans



Code ↑	Fiscal Year ↑	Description	Rate %	Threshold Per Week	Threshold Per Month	Thre
→ PGL	2020/2021	Post Graduate Loan	6.00	403.84	1,750.00	2
SLP1	2020/2021	Student Loan Plan 1	9.00	372.88	1,615.83	1
SLP2	2020/2021	Student Loan Plan 2	9.00	511.05	2,214.58	2

## 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



Statutory Code	Fiscal Year	Description	Active	HMRC
SPP	2020/2021	SPP Policy for 2020/2021.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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	<input type="text" value="2020/2021"/>	Active	<input checked="" type="checkbox"/>
Statutory Code	<input type="text" value="SPP"/>	HMRC	<input checked="" type="checkbox"/>
Description	<input type="text" value="SPP Policy for 2020/2021."/>		

### Eligibility Criteria

Applicable to	<input type="text" value="Male"/>	Relevant Period in Weeks for AWE Asses...	<input type="text" value="0.00"/>
Min. Week Employment	<input type="text" value="0.00"/>	Notice Required	<input type="checkbox"/>
Min. Average Weekly Earning	<input type="text" value="10.00"/>		

### Entitlement

Max No. of Weeks it can be paid for	<input type="text" value="1.00"/>	Max no. of weeks paid at Average Weekl...	<input type="text" value="0.00"/>
Standard Weekly Rate	<input type="text" value="151.20"/>	Lower of SR or x% of AWE	<input type="text" value="90.00"/>

## 17.HMRC Setup

This setup is for the integration of FPS integration with HMRC. Search for “**HMRC Setup**” in the search bar and just fill in the required information here for the integration to work.

← HMRC Setup ✓ Saved

# 2450ce2b-d0c4-ea11-a812-0022480069c4

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

### Related

### General

Class	<input type="text" value="HMRC-PAYE-RTI-FPS"/>	PAYE Reference	<input type="text" value="A635"/>
Sender ID	<input type="text" value="....."/>	AO Reference	<input type="text" value="635PC00000000"/>
Password	<input type="text" value="....."/>	COTAX reference	<input type="text"/>
Tax Office Number	<input type="text" value="635"/>	Related Tax Year	<input type="text" value="20-21"/>
Tax Office Reference	<input type="text" value="A635"/>	Period End	<input type="text" value="4/5/2021"/>
Channel URI	<input type="text" value="8094"/>	Vendor ID	<input type="text" value="1"/>
Channel Product	<input type="text" value="Dogma test"/>	Envelope Version	<input type="text" value="2.0"/>
Channel Version	<input type="text" value="1.0"/>	Item	<input type="text" value="1111111111"/>
Sender	<input type="text" value="Employer"/>	Originator Sort Code	<input type="text"/>

## 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.

The screenshot shows the 'Employee Card' for 'AH · Annette · Hill'. The 'Payroll' tab is active, displaying two columns of settings: 'Setups' and 'Calculations'. The 'Setups' column includes fields for Salary Level (SR), Salary Grade (QA), Pay Cycle Code (MONTHLY), Tax Area Code (BRITAIN), Tax Code Basis (Cumulative), HMRC Tax Code (1250L), National Insurance Class (CLASS 1), National Insurance Category (A), Pension Set (SET B), Employee Work Shift, Associated User ID, and Pay Unit (Per Month). The 'Calculations' column shows Total Earning (0.00), Balance (0.00), Total Deduction (0.00), Tax Net Change (0.00), and Total Loan (0.00). The top navigation bar includes 'New', 'Process', 'Report', 'Employee', 'Navigate', 'Related', and 'Fewer options'. The date '12/12/1963' is visible in the top right corner.

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

The screenshot shows the 'Employee Card' for 'AH · Annette · Hill' with the 'Process' tab selected. The 'Process' tab is highlighted in yellow. Below the navigation bar, there are five action buttons: 'Verify HMRC Details', 'Add Car Benefits', 'Pay Employee', 'Employee Elements', and 'Student Loan'. The 'Employee Elements' button is highlighted in yellow. Below the buttons, there are several input fields for employee details: No. (AH), First Name (Annette), Middle Name, Last Name (Hill), Initials (AHILL), Search Name (AHILL), Gender (Female), and Company Phone No. (4465-4899-4643). The top navigation bar includes 'New', 'Process', 'Report', 'Employee', 'Navigate', 'Related', and 'Fewer options'. The date '30/12/2020' is visible in the top left corner.

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

<span>🔍 Search</span> <span>+ New</span> <span>✎ Edit List</span> <span>🗑 Delete</span> <span>Page</span>							
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](#)

<span>🔍 Search</span> <span>+ New</span> <span>✎ Edit List</span> <span>🗑 Delete</span> <span>Page</span> <span style="float: right;">🔍 ☰</span>				
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 .....	<input type="checkbox"/>

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 .....	<input type="checkbox"/>
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

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  





On current page (Payroll RC)



-  **New Payroll Batch**  
Generate new Payroll Batch
-  **Posted Payroll Batches**  
Executes the Posted Payroll Batches 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.







     Saved  

### Payroll Batch

[Actions](#)

 Add Employees  Get Pay Elements  Process Pay Elements  Calculate & Release  Re-Open  Post...  Post and Send... 

**General** Show more

Batch No. ....	PR00001		Posting Date .....	5/6/2020	
<b>Frequency</b> .....	MONTHLY		Document Status .....	Open	
<b>Fiscal Year</b> .....	2020/2021		Expected Payment Date .....	5/6/2020	
<b>Period</b> .....		1 	Total Days .....		30

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.





PR00001

## Actions

Add Employees

Get Pay Elements

Process Pay Elements

Calculate &amp; Release

Re-Open

Post...

Post and Send...



Batch No. ....	PR00001	...	Posting Date .....	5/6/2020
Frequency .....	MONTHLY	▼	Document Status .....	Open
Fiscal Year .....	2020/2021	▼	Expected Payment Date .....	5/6/2020
Period .....	1	▼	Total Days .....	30

## Details

Manage



Employee	Employee Name	Pay Unit	Worked Quantity (Hrs/Days)	Present Days	Week off Days	Leave Days	Absent Days	Statutory Leave Days	Tc
TAX1	Jimmy Restof-UK	Per Month	0.00	22.00	8.00	0.00	0.00	0.00	

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

## Subscription

Remaining ..... 3      Required ..... 3

6. 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.
7. 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.



SiriusPayroll365 is a product of SiriusApp

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