

# Accentra Primo Umbrella

## December 2019 Release Notes v1.0.7060



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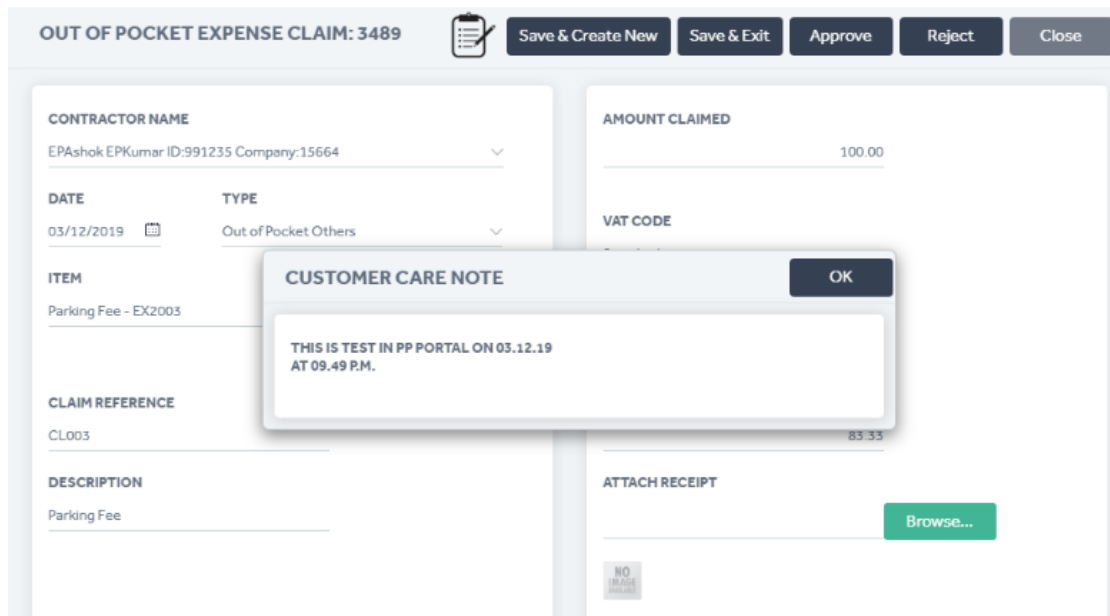
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## I ENHANCEMENTS

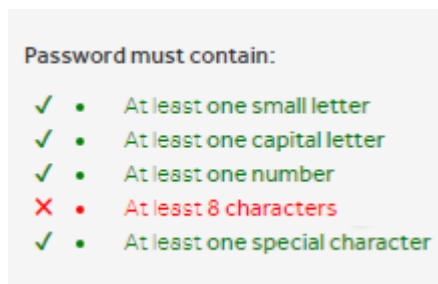
### I.1 CUSTOMER CARE NOTES

We've added a customer care notes section to contractor records so you can add any important contractor information, for example if they're an apprentice or only eligible to work certain hours per week. The note will show as a pop-up when you add any new assignments, timesheets or expense claims relating to that contractor.



### I.2 CONTRACTOR PORTAL – PASSWORD POLICY

The below criteria list will be visible when a contractor is choosing a password for their contractor portal login (available with Enterprise Edition only). Each point will be highlighted in green if the criteria is met and any point that hasn't been met will show in red so the contractor will know exactly why their password hasn't been accepted.



### 1.3 MILEAGE CLAIMS

You'll now be able to see the number of miles a contractor has claimed for in the current year in their record, on their payslip and on the contractor list screen. If you have the Enterprise Edition of Primo Umbrella and are using the contractor portal, the contractor will be able to see their mileage claim total when they login there, too.

#### YTD Details

<b>GROSS FOR TAX</b>	<b>TAX DEDUCTED</b>
£7,120.00	£2,420.96
<b>GROSS FOR NI</b>	<b>NI EMPLOYEE</b>
£7,120.00	£294.96
<b>NI EMPLOYER</b>	<b>STUDENT LOAN</b>
£936.74	£0.00
<b>MILES CLAIMED</b>	
0	

### 1.4 EMAIL TEMPLATES

You're now able to create Mail Merge Templates which you can save to a list and attach as a PDF to any emails you send out from Primo Umbrella. Just go to **Settings -> Email & SMS -> Mail Merge Templates** and enter any desired text – including any smart fields you want to add e.g. [EmployeeForenames].

To send your template, go to **Tools -> Generate Document to Contractors** and select the email design and contractors you wish to send the message to as normal. Then set the Source Type to 'Mail Merge Templates' and click the + icon next to Document List to choose the relevant template to attach to your email.

#### Generate Document to Contractors

Email Design: PAYSリップ - Payslip  
Contractor ID: 50005 To 50005 **Load List**  
Source Type: Mail Merge Templates

**Recipient List** **Build List** **Document List** **+** **Delete**

ID	NAME	EMAIL
No data to paginate < >		

DOCUMENT NAME
No data to paginate < >

### 1.5 SMS STATUS

You'll see a status report each time you send out SMS messages from the system. This will show how many of the messages were sent successfully and if any of them failed. For any of the failed messages you'll also see an error message with the reason for failure.

The screenshot shows the 'Payroll Control Report Extended' interface. At the top, there's a navigation bar with 'Vee Infotech 7 - 18912 13 DEC 2019 HMRC TAX WEEK 36 | TAX MONTH 9' and a 'Service Provider' dropdown. Below the title, there are filters for 'Weekly', 'Tax Period 33', 'Tax Year 2019', 'All Email Items', 'All SMS Items', and 'All Agencies'. A 'Group by Agency?' checkbox is also present. A green notification box on the right says 'SMS message has been queued for delivery' with a checkmark and 'Selected: 2, Success: 2, Failed: 0'. The main table has columns: EMP.ID, AGENCY REF, FORENAMES, SURNAME, TAX PERIOD, AGENCY ID, INCOME, HOURS, MARGIN, AL DEDUCTION, and SAL. The table contains 5 rows of employee data with a total row at the bottom.

EMP.ID	AGENCY REF	FORENAMES	SURNAME	TAX PERIOD	AGENCY ID	INCOME	HOURS	MARGIN	AL DEDUCTION	SAL
50005	A1135	EKSuresh	EKKumar	33/2019	1012463	3,560.00	106.00	5.50	0.00	3,110.00
50004	A1134	EJSuresh	EJKumar	33/2019	1012463	2,660.00	76.00	5.50	0.00	2,290.00
50003	A1133	EISuresh	EIKumar	33/2019	1012463	2,720.00	136.00	5.50	0.00	2,310.00
50002	A1132	EHSuresh	EHKumar	33/2019	1012463	2,960.00	86.00	5.50	0.00	2,590.00
50001	A1131	EGSuresh	EKGumar	33/2019	1012463	4,360.00	126.00	5.50	0.00	3,800.00
						<b>16,260.00</b>	<b>530.00</b>	<b>27.50</b>	<b>0.00</b>	<b>14,100.00</b>

### 1.6 NON-PAYE CONTROL REPORT

We've added a couple of new columns to the Non-PAYE Control Report; Materials and Billable Expenses.

The screenshot shows the 'Non-PAYE Payroll Control Report' interface. At the top, there are filters for 'CIS Self-Employed', 'Outstanding Invoices', 'Tax Week 37/2019', and 'All Items'. The main table has columns: RACTOR NAME, TIMESHEET EARNINGS, MARGIN, GROSS, MATERIALS, BILLABLE EXPENSE, VAT, and NET. The table contains 3 rows of data with a total row at the bottom. The 'MATERIALS' and 'BILLABLE EXPENSE' columns are highlighted with a red box.

RACTOR NAME	TIMESHEET EARNINGS	MARGIN	GROSS	MATERIALS	BILLABLE EXPENSE	VAT	NET
sterio	750.00	7.00	743.00	0.00	0.00	0.00	526.10
sterio	750.00	7.00	743.00	20.00	10.00	0.00	526.10
Thomtom	200.00	4.50	195.50	200.00	0.00	0.00	196.40
		<b>1,700.00</b>	<b>18.50</b>	<b>1,681.50</b>	<b>220.00</b>	<b>10.00</b>	<b>1,248.60</b>

Note: As there have been few design changes on the portal, please press (Ctrl + Shift + R) to update your cache to the latest version when you login to the portal if you're experiencing continuous loading/freezing issues.

## SUPPORT

We welcome any suggestions for improvements to the software. Please send an email to the below mentioned email address if you have any feedback or suggestions.

If you are experiencing any issues with the software please email the support team at [support@accentra.co.uk](mailto:support@accentra.co.uk) before you call. This will generate a support ticket and allow our team to respond promptly. Please include your Payroll company ID and contact details in the email.

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