Accentra Primo Umbrella
December 2019 Release Notes v1.0.7060

Accentra Technologies Limited
Warnford Court
29 Throgmorton Street
London, EC2N 2AT

Table of Contents

1   ENHANCEMENTS

1.1   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.
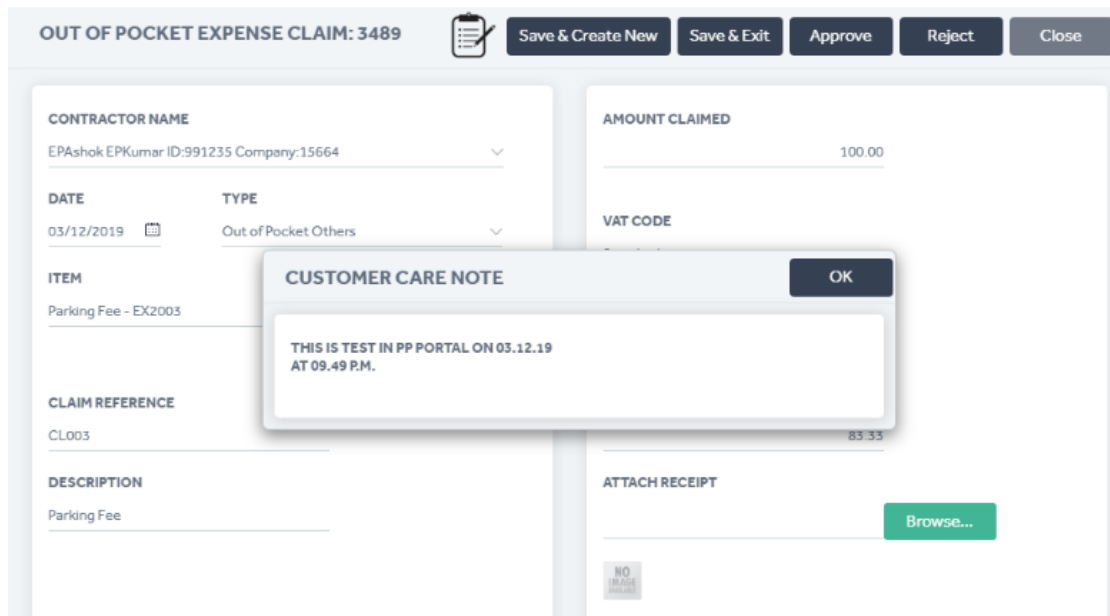

1.2   CONTRACTOR PORTAL – PASSWORD POLICY

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.
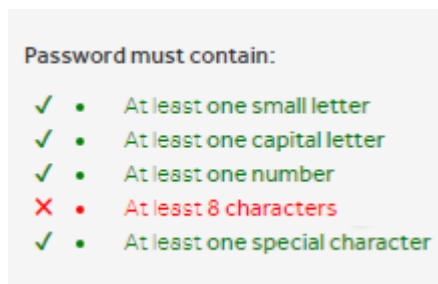
1.3   MILEAGE CLAIMS

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

GROSS FOR TAX	**TAX DEDUCTED**
£7,120.00	£2,420.96
GROSS FOR NI	**NI EMPLOYEE**
£7,120.00	£294.96
NI EMPLOYER	**STUDENT LOAN**
£936.74	£0.00
MILES CLAIMED	
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 Document   Close

Email Design	PAYSLIP - 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.

1.6   Non-PAYE Control Report

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

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 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.

Primo Umbrella Support Team

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