

Accentra Primo Umbrella

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I ENHANCEMENTS

I.1 EPS SUBMISSION - BUSINESS SECTOR WARNING

If you claim Employment Allowance you need to specify your business sector to be able to submit your EPS. If this hasn't been done, the below warning message will show. You can specify your business sector in

Settings -> My Business -> Company Details -> Name & Address Section

The screenshot shows the 'EPS Submission' screen for Accentra Technologies. At the top, there is a navigation bar with 'Service Provider' and various icons. Below it, the 'EPS Submission' header includes 'Tax Month: 2' and 'Tax Year: 2020'. There are 'Export' and 'Calculate' buttons. A red warning box with a shield icon and the text 'Business sector is mandatory.' is overlaid on the 'Calculate' button. Below the warning, there are checkboxes for 'Current Year: 2020', 'Use Agent Credentials?', and 'Final submission for this tax year?'. The main area contains a table with 12 columns: ACTION, COMPANY ID, TAX MONTH, EPS DUE DATE, EPS DATE, AMOUNT DUE, TAX, STUDENT LOAN, PG LOAN, NET NI CONTRIBUTION, CIS DEDUCTIONS, EMP. ALLOWANCE CLAIMED, and STATUS. The table lists five items with zero values for most fields.

ACTION	COMPANY ID	TAX MONTH	EPS DUE DATE	EPS DATE	AMOUNT DUE	TAX	STUDENT LOAN	PG LOAN	NET NI CONTRIBUTION	CIS DEDUCTIONS	EMP. ALLOWANCE CLAIMED	STATUS
<input type="checkbox"/>	21776	2	06/06/2020		0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/>	20777	2	06/06/2020		0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/>	20776	2	06/06/2020		0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/>	20775	2	06/06/2020		0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/>	20774	2	06/06/2020		0.00	0.00	0.00	0.00	0.00	0.00	0.00	

I.2 BULK EMAIL – CONTRACTOR STATUS

We've added a Contractor Status dropdown list to the list builder screen when sending bulk emails to contractors.

Tools -> Bulk Email to Contractors

The screenshot shows the 'Recipient Criteria' section of the 'Bulk Email to Contractors' tool. It includes 'Contractor From' (Theodore Webb - 50001) and 'Contractor To' (Catalina Hawkins - 50003). The 'Contractor Status' dropdown is open, showing options: All, Current (highlighted), Leavers, Awaiting Contract, Unlocked, Locked, and On Hold. There are 'Load List' and 'Close' buttons at the top right.

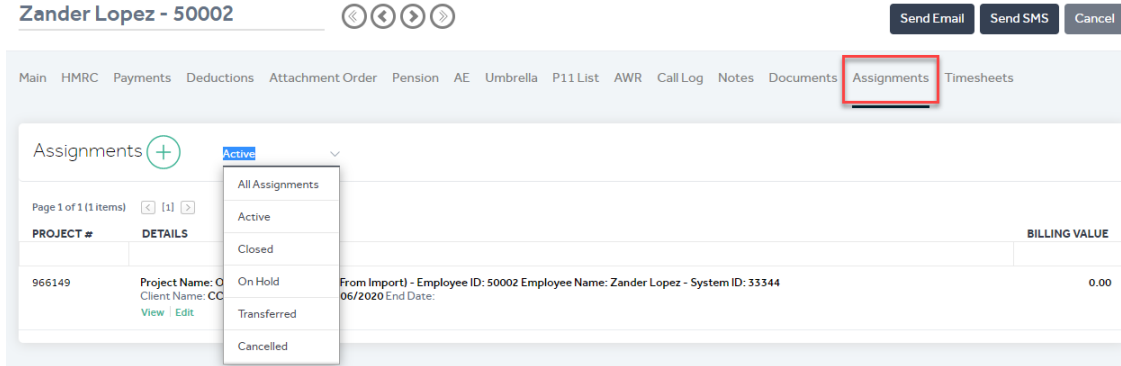
I.3 AUTO ENROLMENT – ASSESSMENT EMAIL NOTIFICATION

After you run payroll, if any contractors have been assessment or skipped then Primo Umbrella will send an email notification to you as the bureau/employer with detailed information as below:

Employee Id	Employee Name	Date Of Birth	Age	Earnings	AE Category
50002	James Chirs	01-01-1985	XX	833.35	Eligible Jobholder
50003	Chris Cooper	01-10-1999	XX	600.25	Non-Eligible Jobholder
50012	Harsha Kanna	01-11-1998	XX	230.00	Entitled Worker

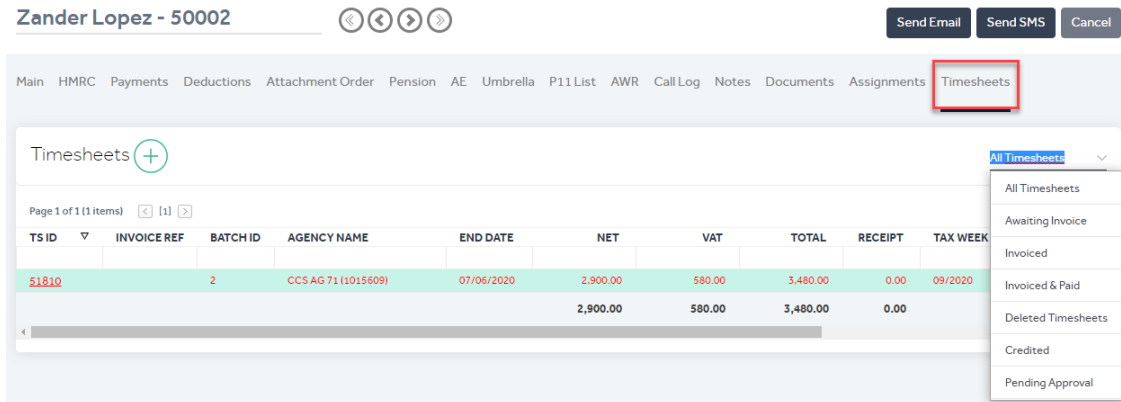
I.4 CONTRACTOR RECORD – ASSIGNMENTS TAB

We've added an Assignments tab to contractor records where you can view and edit any assignments related to that contractor. You can filter the list of assignments by the assignment status; active, cancelled, etc.



I.5 CONTRACTOR RECORD – TIMESHEETS TAB

We've also added a Timesheets tab to contractor records where you can view all timesheets belonging to that contractor. You can filter the list of timesheets by the status; awaiting invoice, invoiced and paid, etc.



I.6 ACCOUNTING REPORTS

The following reports have been added to the Accounting Reports section in the main menu:

- Ledger Card - you can filter the report by Ledger Type, Customer/Supplier and Transaction Dates.
- Customer Activity and Supplier Activity - you can filter these reports by Report Type (Detailed or Summary), Customer/Supplier, Transaction Number and Transaction Date.
- Supplier Ageing – like Customer Ageing, you can choose between Detailed or Summary.

I.7 EXPENSES – NOTES SECTION

You can now add notes to contractors' out of pocket expense claims.

OUT OF POCKET EXPENSE CLAIM - NEW [Save & Create New] [Save & Exit] [Close]

CONTRACTOR NAME
Randolph Anahi ID:1015733 Company:20016

DATE
dd/mm/yyyy

TYPE
Select

ITEM
Select Item

CLAIM REFERENCE
Reference

DESCRIPTION
Description

NOTES

AMOUNT CLAIMED

VAT CODE
Standard 20.00%

VAT
0.00

TOTAL
0.00

ATTACH RECEIPT
Browse...

NO IMAGE UPLOAD

I.8 HMRC NOTIFICATIONS FILTER

A pay frequency filter has been added to the HMRC notifications screen so you can selectively download and apply P6/P9/Student Loan/PG Student Loan notifications.

Accentra Technologies 300 - 10521 22 JUN 2020 HMRC TAX WEEK 12 | TAX MONTH 3

Service Provider [Home] [Settings] [Menu]

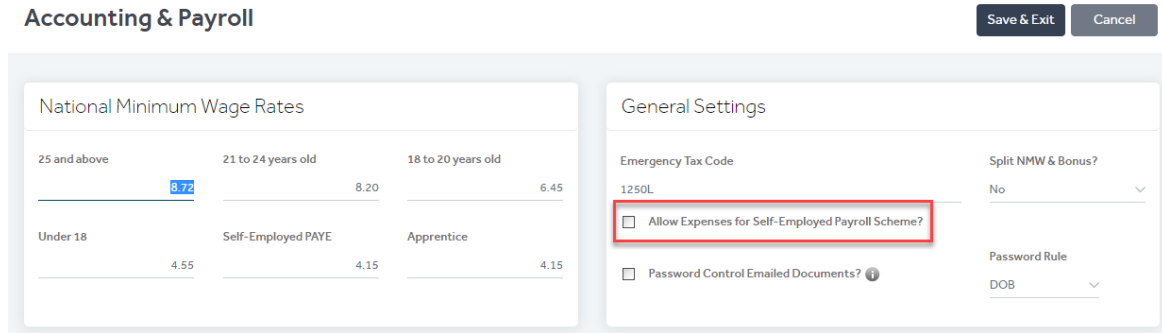
P6/P9 Updates PayFrequency: All [Skip Un-Matched] [Print] [Close]

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COMPANY ID	TYPE	PAYROLL#	NI NUMBER	TAX CODE	NEW NI NUMBER	PREVIOUS PAY	PREVIOUS TAX	NEW TAX CODE
10513	P6	HG849Q				1,970.00	585.29	C1375M
10513	P6	NF94H1				0.00	0.00	C1035N
10513	P6	ENC/1				3,497.00	535.26	1323L
10513	P6	EMR/1				0.00	0.00	SD2
10513	P6	84HD92				0.00	0.00	COT
10513	P6	MGOE10				0.00	0.00	492L
10513	P6	HFI483				0.00	0.00	SD2

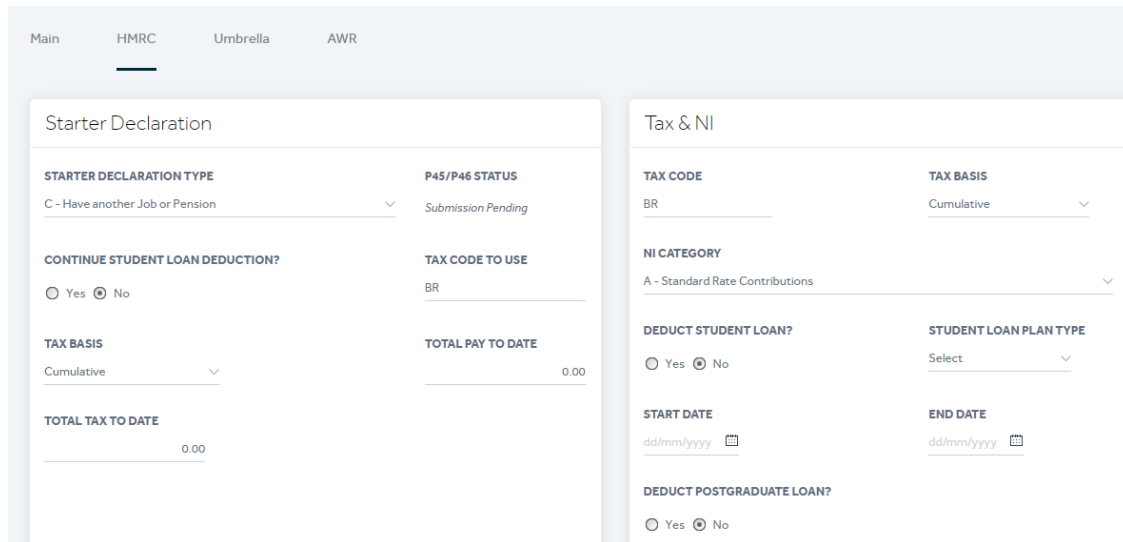
1.9 CIS - SELF-EMPLOYED EXPENSES

We've added the option to allow/disallow expenses for the Self-Employed Payroll Scheme in CIS accounts. You can do this in *Settings -> Accounting -> Accounting & Payroll -> General Settings*. If you disallow expenses, all expense related pages will be hidden in your account.



1.10 NEW CONTRACTOR TAX & NI

Some of the information you enter into the Starter Declaration Form for a new contractor (Starter Declaration Type, Tax Code, Student Loan Deduction) will automatically populate fields in the Tax & NI section of their record.



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.

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