

2024

Quick Payroll Cloud & HR

October Product Update

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October Releases

Custom Form – Company Repository

A new **Company Repository** custom form type is now available on the Company Custom Form Configuration screen.

Users can compile and manage a list of additional required information on company-level screens, which can then be linked to employees through a Company Repository Reference custom field, ensuring that data is captured and stored correctly.

Please note: Custom Forms are only available on Master edition.

Example:

A dedicated form for training institutions, complete with custom fields, is used to capture training institute information on the Basic Company Information screen.

Category Name ↑	Category Code	Form Type	Employee Screen	Company Screen	Required
Training Institutions		(All)	(All)	(All)	(All)
Category Name *	Category Code *	Form Type *		Company Screen *	Required
Training Institutions	CRF	Company Repository		Basic Company Information	<input type="checkbox"/>
<input checked="" type="radio"/> Company Level <input type="radio"/> Employee Level				Hide custom form for the following security roles Select...	
<input type="checkbox"/> Required					

Form Category: Training Institutions

Group name

- Training Institute Details

Various custom fields to capture training institute details are added to the form.

Order	Label	Field Code	Parent Field Code	Required	Field Type	Field Group
1	Facilitator Name and Surname	FNS		<input type="checkbox"/>	text	Training Institute Details
2	Facilitator Contact Number	CTN		<input type="checkbox"/>	number	Training Institute Details
3	Training Institute Address	Address		<input type="checkbox"/>	text	Training Institute Details
4	Institute Support Email	email		<input type="checkbox"/>	text	Training Institute Details

Administrators can easily enter training institute information on the Basic Company Information screen using the new form.

Basic Company Information

Company | Statutory Fields | Company Address | Company Themes | General | Contact | **Training Institutions**

Description: Training Institute A | Code: TrainingA







Effective Date: 2024/09/01 | Inactive Date: []

Custom Fields: Training Institute Details

Facilitator Name and Surname: John Doe | Facilitator Contact Number: 111231234 | Training Institute Address: 13 Hero Street, Gotham City

Institute Support Email: johndoe@maildrop.cc

Save | Cancel

Training Institute B	TrainingB	  
Training Institute C	Training C	  

After completing the form, a Company Repository Reference custom field is used to link employees to their corresponding training institute information stored in the repository.

Training Records

Effective/Start date ↓ | Course | Training Status | Notes | Attachment

Effective/Start date: 2024/09/26 | End Date: [] | Course: Music and Rhythm

Training Status: In progress | Certificate No: [] | Certificate Expiry Date: []

Add Reminder

Attachment: or Drop a file here

Additional

Employee Training Institution: Training Institute B

Save | Cancel

Dynamic Form Builder

The Dynamic Form Builder is available on the Custom Screens & Fields configuration menu! An "Add New Employee" module type allows you to customise onboarding templates to simplify your employee onboarding process by capturing their details on one page based on your organisation's needs.



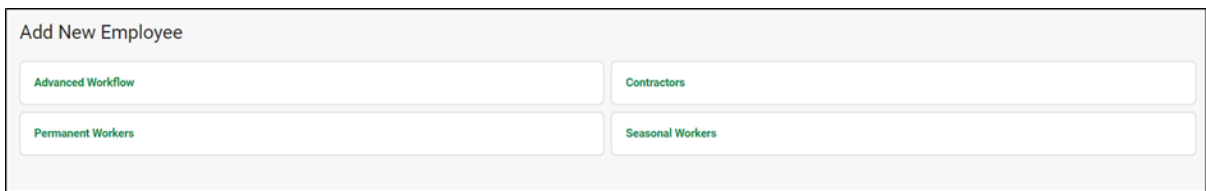
Config / Basic Settings / Custom Screens & Fields
Dynamic Form Builder

Form Header

Module Type *
Add New Employee

Form Name *

Once employee onboarding templates are created, users will find their template cards available for selection on the "Add New Employee" screen. Additionally, if a more detailed onboarding process is required, the Advanced Workflow option will also be accessible on the same screen.



Add New Employee

Advanced Workflow

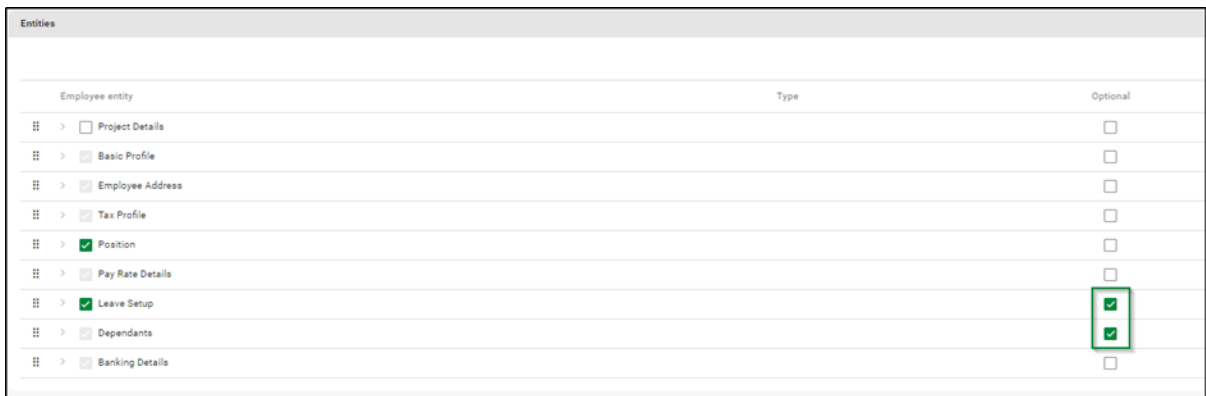
Contractors

Permanent Workers

Seasonal Workers

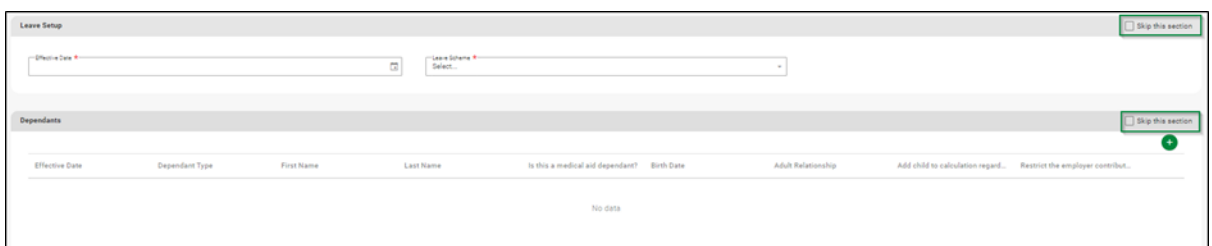
Using the "Add New Employee" form on the Dynamic Form Builder, you can:

- Create multiple onboarding templates per company.
- Mark specific onboarding sections as optional.



Employee entity	Type	Optional
<input type="checkbox"/> Project Details		<input type="checkbox"/>
<input checked="" type="checkbox"/> Basic Profile		<input type="checkbox"/>
<input checked="" type="checkbox"/> Employee Address		<input type="checkbox"/>
<input checked="" type="checkbox"/> Tax Profile		<input type="checkbox"/>
<input checked="" type="checkbox"/> Position		<input type="checkbox"/>
<input checked="" type="checkbox"/> Pay Rate Details		<input type="checkbox"/>
<input checked="" type="checkbox"/> Leave Setup		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Dependants		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Banking Details		<input type="checkbox"/>

Sections marked optional will feature a "skip section" option on the onboarding form.



Leave Setup Skip this section

Effective Date *
Select...

Leave Scheme *
Select...

Dependants Skip this section

Effective Date	Dependent Type	First Name	Last Name	Is this a medical aid dependent?	Birth Date	ADP Relationship	Add child to calculation regard...	Restrict the employer contrib...
No data								

- Mark specific fields as required.

Employee entity	Type	Optional	Required	Edit
<input type="checkbox"/> Project Details		<input type="checkbox"/>		
<input type="checkbox"/> Basic Profile		<input type="checkbox"/>		
<input type="checkbox"/> Employee Address		<input type="checkbox"/>		
<input type="checkbox"/> Tax Profile		<input type="checkbox"/>		
<input checked="" type="checkbox"/> Position		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Effective Date	Date	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Position	Lookup		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Employment status	Lookup		<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Override Grade	Lookup		<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Override directly reports to position	Lookup		<input type="checkbox"/>	<input checked="" type="checkbox"/>

- Setup default information to populate in fields and configure field visibility conditions.

Employment status

Field Properties

Permanent

Show on form

Field Visibility

And +

Position - Position Equals Financial Manager

- Reorder your onboarding form using drag and drop motion.

Employee entity	Type	Optional	Required	Edit
<input type="checkbox"/> Project Details		<input type="checkbox"/>		
<input type="checkbox"/> Basic Profile		<input type="checkbox"/>		
<input type="checkbox"/> Employee Address		<input type="checkbox"/>		
<input type="checkbox"/> Tax Profile		<input type="checkbox"/>		
<input checked="" type="checkbox"/> Position		<input type="checkbox"/>		
<input type="checkbox"/> Pay Rate Details		<input type="checkbox"/>		
<input checked="" type="checkbox"/> Leave Setup		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Dependents		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Banking Details		<input type="checkbox"/>		

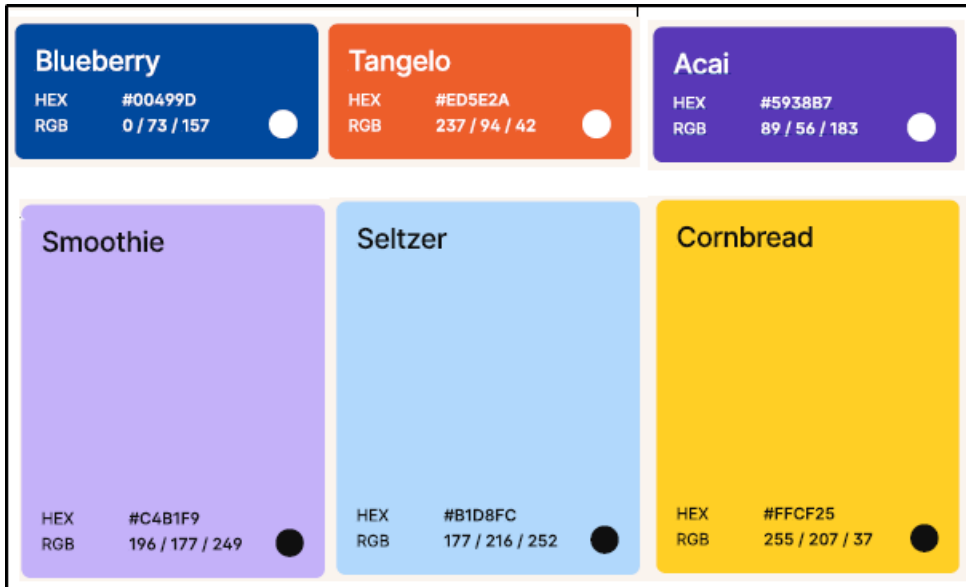
- If you have Custom Forms or Custom Fields setup, these are also included in the form in the sort order configured on screen.

Basic Company Information – Company Themes

Make your payroll pop with new theme colours

Six new colours have been added to the Company Themes tab, expanding our colour palette to eighteen options. This gives companies more flexibility to tailor system theme colours to align with their unique branding specifications.

The new colours are: **Blueberry**, **Tangelo**, **Acai**, **Smoothie**, **Seltzer**, **Cornbread**



Bulk Actions – Organisation Hierarchy Units

The new Organisation Hierarchy Units bulk action template is designed for the swift upload of Organisation Hierarchy Units is accessible under the company “Organization Structure” section.

Bulk Actions

Screen Type:

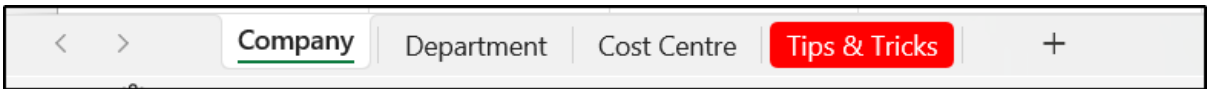
Action Type:

or Drop a file here

Users can download a pre-populated template that includes required fields also reflected on the Organisation Hierarchy Units screen.

	A	B	C	D	E	F
1	Parent (Company)	Unit Description*	GL/Unit Code	Upload Code*	OrganizationUnitId	Link Employee
2	Example Company	Department A		DEP	302386	FALSE
3						

The order of the worksheets in the template will be in the order of the Organisation Levels with the top level shown first.



Users can perform the following actions:

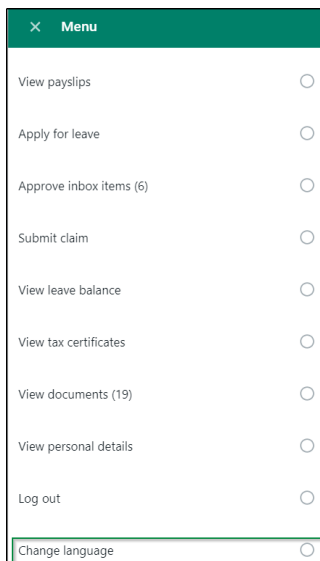
- Add new Org Unit records.
- Edit Org Unit records.
- Move existing Org Units to a different parent level Org Unit of the same level. This will also move all other dependency units linked to the Org Unit where applicable.

Pacey enhancement – New language option

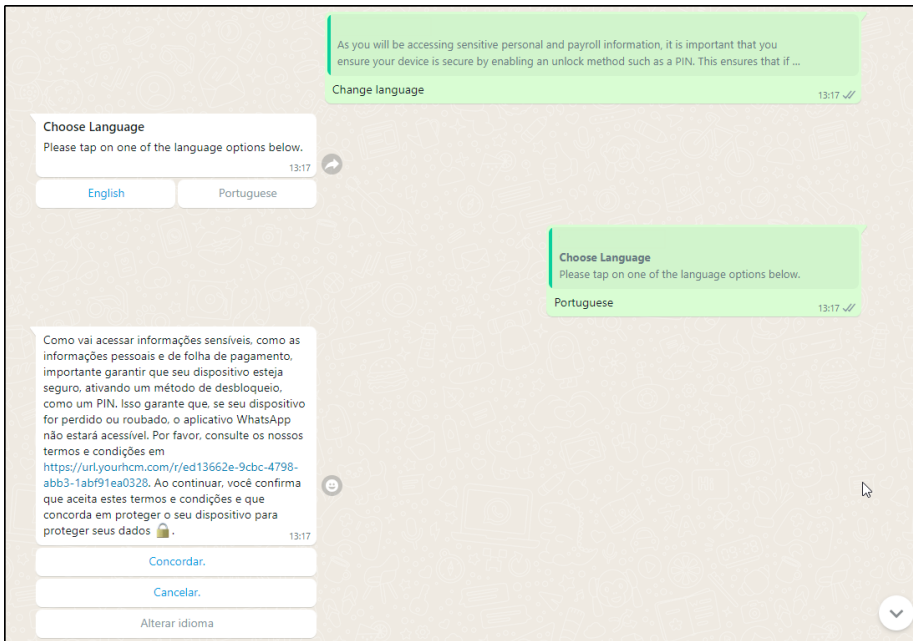
As we expand our global footprint and launch in different countries we’re creating multiple language options for Pacey. We’re introducing Portuguese (Brazil) as our first additional language, paving the way for an inclusive experience.

How?

On the Main menu, tap the ‘change language’ option



Once users have selected their preferred language for Pacey, all messages and notifications will be presented in that language.



Income Base Source Type – Total of Cost to Company Components

A new income base Source Type is available that automatically calculates the Total of Cost to Company components that are flagged as such on the General ledger parameter screen.

Define The Income			
income base description:	<input type="text" value="Total Cost to Company"/>		
how many sources make up this defined income ?	<input type="text" value="1"/>	<input type="button" value="create lines"/>	
Manner	Percentage / Amount	Source Type	
1 % of Income Source	<input type="text" value="100"/>	Total of Cost to Company com	
+ Extra Options			
			<input type="button" value="add income base"/>

Cost to Company tick on General Ledger Parameters screen:

part of cost to company:	<input checked="" type="checkbox"/>
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If you would like to add a note component to employee’s payslips that calculate the Cost to Company, simply create a new component with the source type as shown above, and ensure all relevant components are ticked as “part of cost to company”.

New Features & Enhancements Coming Soon

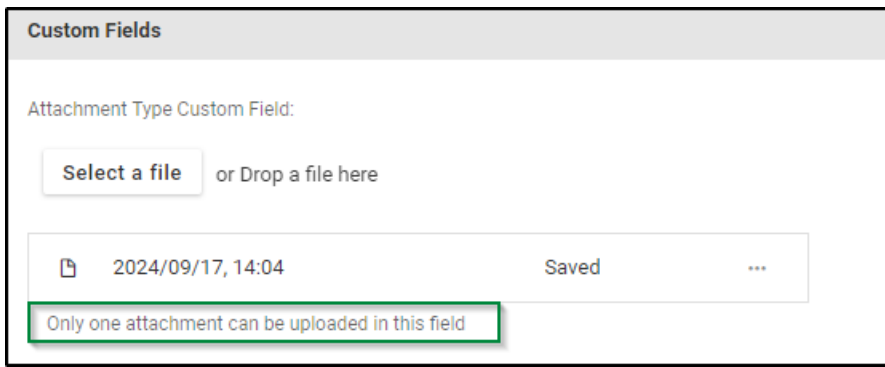
Custom Fields

We're developing two Custom Field usability enhancements.

Tooltips

We create tooltips where needed to guide users on the use of certain fields. Tooltips offer users essential information about fields by clarifying their purpose and usage.

We're extending this capability so that you have the flexibility to add tooltips as well when you create your own custom fields. By providing helpful guidance and instructions, tooltips will enhance the user experience, making it easier to accurately populate fields.

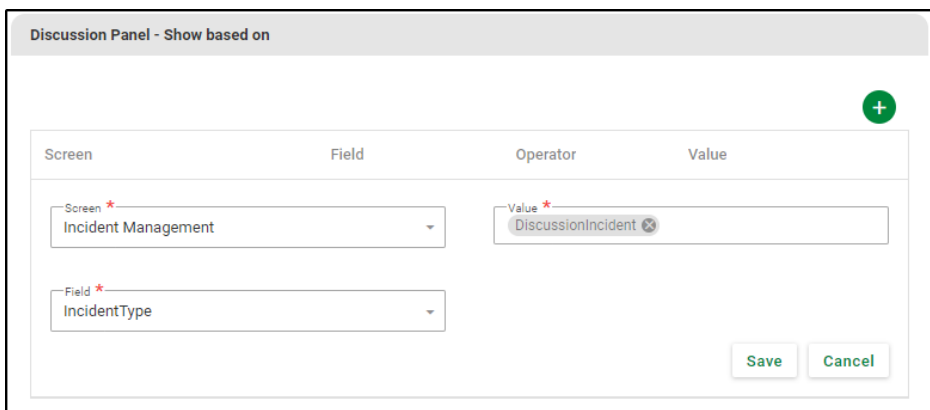


Conditional Visibility

Conditional visibility means you can setup Custom Fields to only display when certain predefined conditions are met.

Example:

You can configure a custom field on the Incident Management screen, namely *Discussion Date* to display only when incident type is set to "Discussion."

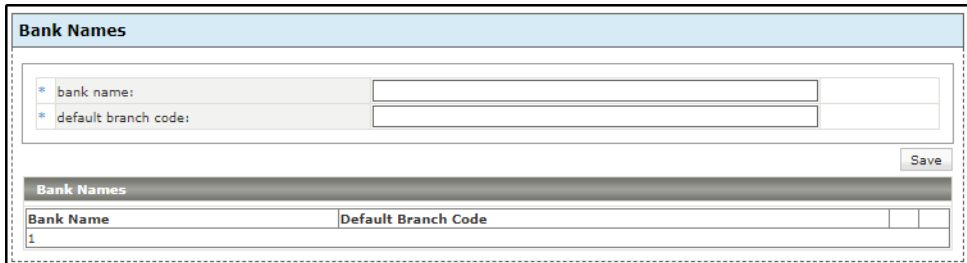


Other Dropdowns – Bank Names

We're developing an additional dropdown section under the Other Dropdowns menu to allow you the ability to add and maintain Bank Names as needed.

With this new section you can add and maintain your own:

- Bank Name
- Default branch code



The screenshot shows a web form titled "Bank Names". At the top, there is a light blue header bar with the text "Bank Names". Below this, there are two input fields, each with a red asterisk indicating a required field. The first field is labeled "bank name:" and the second is labeled "default branch code:". To the right of these fields is a "Save" button. Below the input fields, there is a table with a dark grey header bar also labeled "Bank Names". The table has two columns: "Bank Name" and "Default Branch Code". The first row of the table contains the number "1" in the "Bank Name" column.

Bank Names	
Bank Name	Default Branch Code
1	

Feature Spotlight

Cloud Room

Cloud Room

Cloud Room, is a robust data security management feature used for the purpose of ensuring Data Loss Prevention (DLP) by storing shared sensitive information in a secured environment. Cloud Room helps keep your data safe by mitigating the risk of information being attained by unauthorised parties.

Setting up Cloud Room requires 3-easy steps:

1. Setup period processes
2. Configure the payroll process definition
3. Add Cloud Room users

How does it work?


Users can attach files and include comments that are visible to authorised Cloud Room users ensuring that sensitive information is shared with intended recipients.

Create Item



Item Details

Item Subject *	Assigned User *	Status *
New Recruit - Employee 001	Smith Emma	In Progress
Group Name *	Checklist Item *	Run *
Onboarding Sign-Off Process	Onboarding Process	August - 2024
Parent Item		
top level		

Comments



 +

Hi Emma, we've onboarded the new employee with employee number 001 in accordance with the documents you've sent. Please will you have a final look to sign-off the process. Thanks

Attachments

Select a file or Drop a file here

	2024/08/21, 17:51	Employee Details.xlsx	Pending - You have u...	...
	2024/08/21, 17:51	Employee Payslip - FI...	Pending - You have u...	...

Users assigned with a Cloud Room item are also notified via email.

Cloud Room Item with ID	509752
Company	Company A
Info	Info
Parent Item	Top Level
Subject	New Recruit - Employee 001
Status	In Progress
Checklist Item	This process requires newly onboarded employees to be signed-off before the cutoff period to ensure that captured information is correct. - Onboarding Sign-Off Process
Run	Monthly - August - 2024
Date Captured	2024/08/21 17:52:35
Captured By	Johnson Olivia

Benefits of using Cloud Room:

- Authorised users can add as many attachments as necessary.
- Detailed history is stored centrally to help track data shared.
- Safeguards against unintentional data leaks by ensuring that sensitive payroll information remains secure.