

2024

Quick Payroll Cloud & HR

November Product Update

1. November Releases

- Screen conversion – Grades
- Bulk Actions – Grades
- Leave Calendar enhancement – Display custom Public Holidays
- Employee number added to Security screens
- Leave Balances – Leave cycle start date
- Other Dropdowns – Bank Names
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November Releases

Screen conversion – Grades

The newly converted Grades screen have been released.

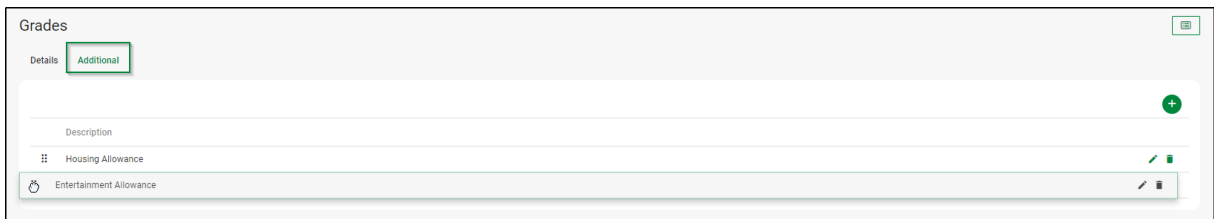
NextGen Screen

In addition to the screen conversion, we're also adding API for the Grades screen which will be available in the API documentation.



Description ↑	Code	Minimum pay rate	Maximum pay rate
GRADE A	A	15000	36000
GRADE B	B	10000	32000
GRADE C	C	8000	30000

The Additional Value descriptions have been moved to a separate tab that is displayed at the top of the screen with the ability to reorder descriptions using drag and drop motion.



Description
Housing Allowance
Entertainment Allowance

Bulk Actions – Grades

As an extension of the Grades screen conversion, we've also created a Grades bulk upload. You will now have the ability to maintain multiple company grade details with a single upload. The Grades bulk upload is accessible under the company "Organization Structure" section.



Screen Type: Company

Action Type: Grades

Select a file or Drop a file here

The template includes the following Grade screen fields, along with additional value description fields configured per company:

	A	B	C	D	E	F	G	H	I
1	Description*	Code*	Minimum pay rate	Maximum pay rate	Bonus percentage	Average pay rate	Eligible for performance evaluation	Housing Allowance	Entertainment Allowance
2									
3									

Leave Calendar enhancement – Display custom Public Holidays

An enhancement was made to the employee Leave Calendar screen. Now, when you create a custom public holiday—whether national or provincial—on company level, it will automatically display on the calendar for the relevant date alongside the existing public holidays for each country.

This will ensure that employees are aware of company-specific public holidays, facilitating better planning and management of their leave requests.

Filters: Training, Out of Office, Annual, Sick, Other, Pending, Birthday, Public Holiday

October 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	01	02	03	04	05
06	07	08 Custom PH	09 Additional Custom PH	10	11	12
13	14	15	16	17	18	19

Employee number added to Security screens

Companies often use employee numbers as unique identifiers when queries are sent relating to requests that require updates to employee information. This necessitates having the ability to use employee numbers to search across various system screens.

We've added an **Employee Number** column to the User Profile and Activate User screens allowing you to easily locate employee profiles using their employee number.

User Profile screen:

User Profile

Company: [Dropdown]

User Type	Employee number	First Name	Last Name	Email	Status	Last login date	Contact Type
Company	EMP001	Smith	Emma		Active	2024/10/11	
Company	EMP004	Jones	Isabella		Active	2024/10/09	

Activate Users screen:

Activate Users

Filter by user type: Employee

User Id	Employee number	First Name	Last Name	Email	Login Date	Is Terminated
<input type="checkbox"/>	EMP002	Johnson	Olivia		2024/10/10	
<input type="checkbox"/>	EMP003	Williams	Sophia		2024/10/08	

Leave Balances – Leave cycle start date

We've introduced the addition of a new column on the employee leave balance screen that displays the start date of each employee's leave cycle, based on settings defined in the leave scheme parameters screen.

Leave Description ↑	Accrual	Leave Balance	Max Balance	Start Date	Due To Expire	Leave Value
Annual	1.25	1.25 days				
Annual Leave	1.25	1.25 days		March 2024	1.25 days are due to expire at the end of February 2025	1 153.67
Annual Leave Carried Over	0.00	0.00 days		September 2024	0.00 days are due to expire at the end of February 2025	0.00

Other Dropdowns – Bank Names

You now have control to manage Bank Names. A new section is available on the Dropdown Management > Other Dropdown menu that will empower users with the ability to add and maintain bank information shown on the Bank Name dropdown list on the employee's Banking Details screen.

The same standard list previously available on the Banking Details screen has been incorporated into the Other Dropdown menu, allowing users the flexibility to maintain the bank names details as needed.

The Bank Names section will include two fields:

Bank name: For entering the name of the bank.

Default branch code: For specifying the default branch code associated with the bank.

Bank Names

* bank name:

default branch code:

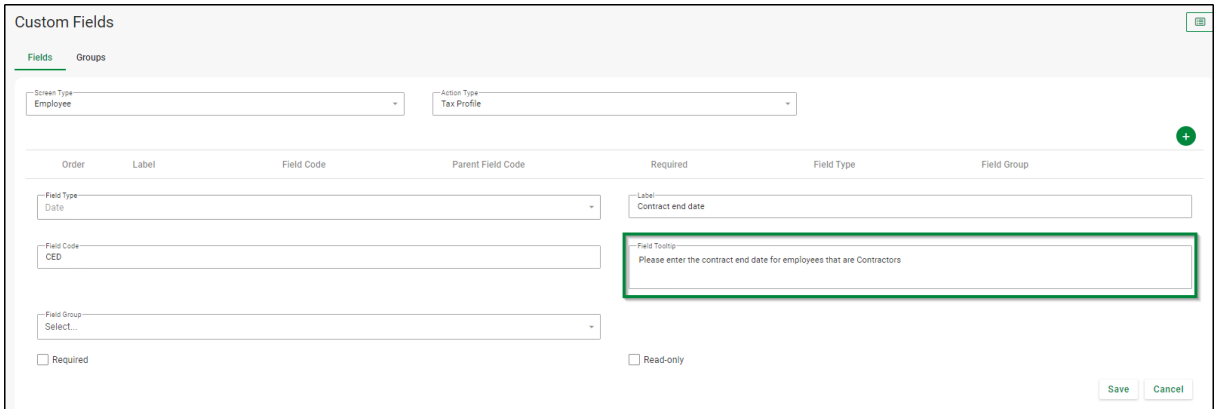
Save

Bank Name	Default Branch Code
1	

Custom Fields – Tooltips functionality

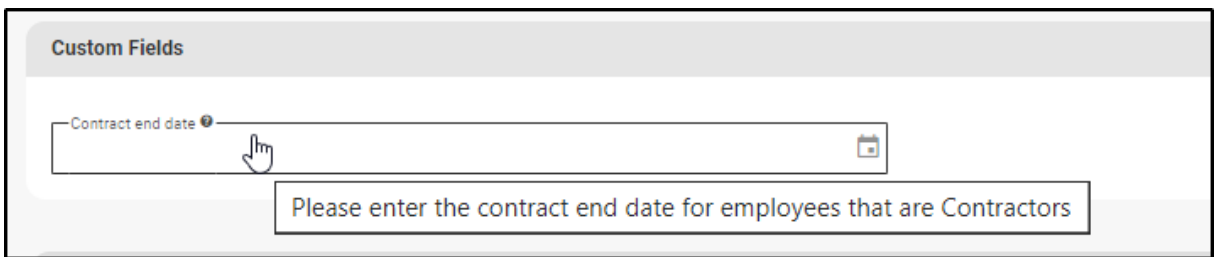
The Custom Fields tooltip functionality is now available. You can enter tooltip text on custom fields providing users with contextual information and instructions on how they can effectively populate each custom field.

Custom field tooltip configuration:



The screenshot shows the 'Custom Fields' configuration page. At the top, there are tabs for 'Fields' and 'Groups'. Below this, there are dropdown menus for 'Screen Type' (set to 'Employee') and 'Action Type' (set to 'Tax Profile'). A table lists the fields with columns: Order, Label, Field Code, Parent Field Code, Required, Field Type, and Field Group. The first row shows a field with 'Field Type' set to 'Date', 'Label' set to 'Contract end date', and 'Field Code' set to 'CED'. A tooltip text box is visible next to the 'Contract end date' label, containing the text: 'Please enter the contract end date for employees that are Contractors'. Below the table, there are checkboxes for 'Required' and 'Read-only'. At the bottom right, there are 'Save' and 'Cancel' buttons.

Tooltip shown on Custom field:



The screenshot shows a 'Custom Fields' configuration page. A text input field is shown with the label 'Contract end date' and a calendar icon. A hand cursor is hovering over the field, and a tooltip box is displayed below the field, containing the text: 'Please enter the contract end date for employees that are Contractors'.

- A '?' icon will appear next to the custom field label if tooltip text has been added.
- When users hover over the field with a '?' icon, the tooltip text will be displayed, offering them additional context and guidance.



Say hello to Pacey.

Our global award-winning WhatsApp employee self-service feature.

Pacey can be used for company announcements, features modern interactive messages and can be accessed internationally.

With Pacey, employees can

- Apply for leave
- Obtain payslips
- Approve inbox items
- View leave balances
- Get tax certificates
- Submit claims

New Features & Enhancements Coming Soon

Screen Conversion – Position Management

We are in the process of converting the Position Management screen to NextGen with enhancements that will improve your user experience.

Position Management

Classic Screen:

Positions

[Click here to view audit trail](#)

Details Skills Qualifications Outputs Competencies Other Training

Position Details

[Adobe PDF](#) [position/job specification](#)

* position title: ?

employees attached to this position: [show employees](#)

* effective date: ?

* grades: ?

purpose of job: ?

special features: ?

position type: ?

sst level: ?

position code:

directly reports to position: ... ?

PM Template: ...

inactive from date: [clear](#)

Other

occupational level: ?

position function: ?

bee level:

OFO level:

salary survey code 1:

salary survey code 2:

position family:

position functional area:

Delete Update

History

To edit a position, please select the relevant position in the grid below by clicking on it once.

[report of all positions' details](#)

Drag a column to this area to group by it. Search:

Description	Effective Date	Code	Inactive From
Financial Manager	01 Jan 1950		
Floor Supervisor	01 Jan 1950		
Personal Assistant	01 Jan 1950		

Example of NextGen Screen:

Position descriptions	Grade	Code	Inactive from
Accounting Manager	G07 - Manager	FD04	
Accounts Payable Specialist	G01 - Entry Level	FD05	
Accounts Receivable Specialist	G04 - Mid-Level	FD06	
Administration Manager	G05 - Senior	FD11	
Budget Analyst	G02 - Junior	FD09	
Chief Executive Officer (CEO)	G09 - Executive	CE01	
Chief Financial Officer (CFO)	G08 - Director	FD02	
Compensation and Benefits Specialist	G06 - Specialist	HR05	
Compensation Manager	G05 - Senior	HR12	
Composer	G01 - Entry Level	MD02	2025/05/01
Conductor	G07 - Manager	MD03	

Position Information

Effective date: 2023/08/22 | Position title: Client Account Manager | Position code: FD04

Grade: G01 - Entry Level | Purpose of position: | Special features: |

Position type: Contract | PM template description: Template name 1 | Inactive from date: 2024/09/02

Occupational level: Professionally qualified, experienced specialists and mid-management | Position Function: Core Operation Function | REE level: Executive Director

CFO Level: 111101 - Local or Provincial Government Legislator | Salary survey code 1: SUV01 | Salary survey code 2: SSU2

Position family: Accountant | Position functional area: Finance

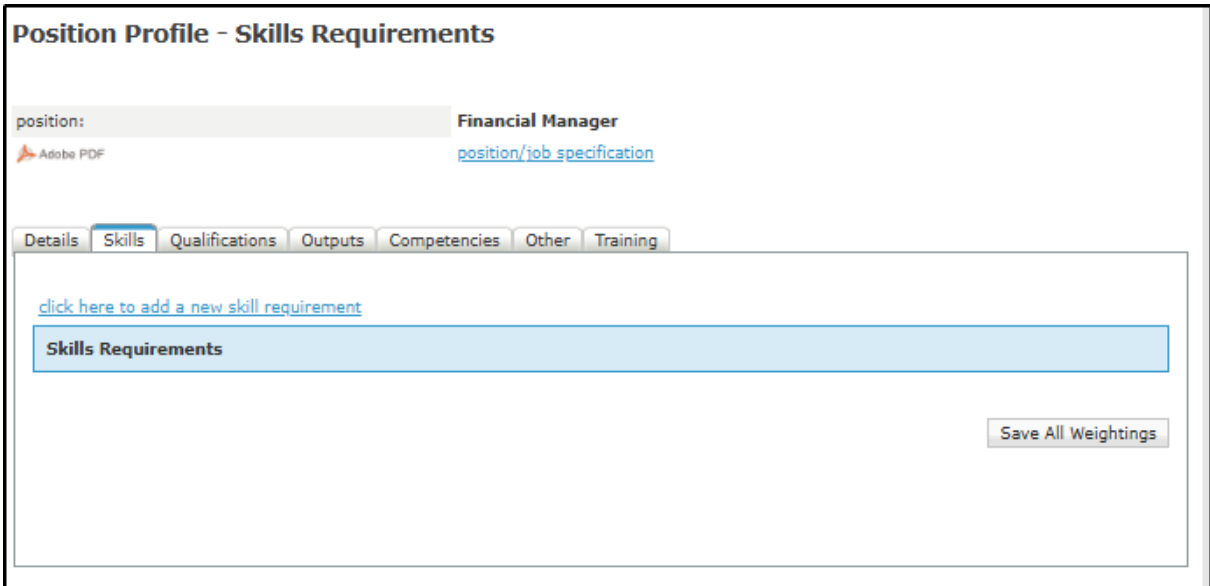
History

Effective date	Inactive from date	Grade
2023/08/22		G01 - Entry Level
2014/04/18		
2004/01/06	2014/04/18	
2002/11/08		
2000/01/03	2001/01/02	
1950/01/03	2000/01/02	

Usability enhancements you can expect from this screen conversion:

- We've introduced a Position History section which stores details of all updates made over time. This enables users to easily track changes made to the position.
- The list of employees linked to the position will be shown on a screen sliding out from the right.

Please note: Only the first landing page of the Position Management screen will be converted. All other tabs of the Position Management screen will be on Classic and are still accessible at the top of the screen visible once a Position record is opened.



Feature Spotlight

Recurring Template

Did you know that Quick Payroll Cloud & HR offers a convenient way to set up employees' recurring payroll components? The Recurring Template screen accessible on the Payroll Config menu allows you to create customisable templates for recurring payroll components that can be linked to employees saving you processing time.

Template Name	Inactive	Edit Name	Edit Setup
Recurring Template - Permanent	False	Edit Name	Edit Setup
Recurring Template - Temporary	False	Edit Name	Edit Setup

You can create customised recurring templates based on various factors such as employment contracts, regions or job titles – the choice is yours. Once you've set up a recurring template, you can easily link it to one employee or even multiple employees using the bulk upload feature ensuring accuracy and consistency across your payroll system.

Component name	Tax code	Amount

Component name	Tax code

How?

1. Make sure a template is setup within the respective frequency.
2. Link employees to their respective template on the recurring payroll components screen or bulk upload screen.