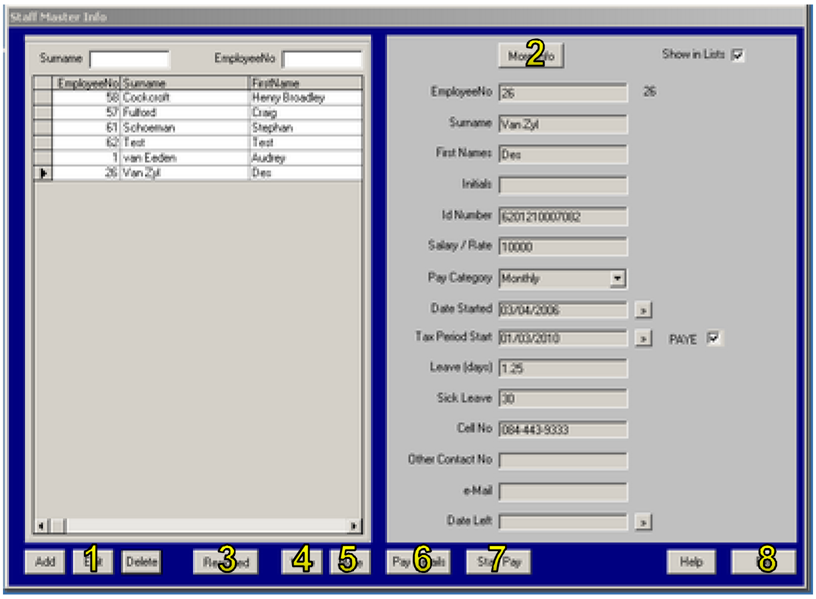
PAYROLL – Capture Staff Info



1 Add, Edit or Delete a Staff Member. When adding or editing a staff member the text fields at the right hand side of the screen will turn white and the information can be entered.

All employees are listed in the left hand frame. The detail of the active record is displayed in the frame on the right. As you move up and down on the left, the detail frame on the right keeps changing to always show the active person's detail (the one with the ► in the first column in the left hand frame).

Explanation of fields

Most of the fields are self-explanatory, here are explanations of the fields witch are not.

Employee No
The employee no can be any number from 1 to 999. If you have an existing set of numbers you are using, you can use it, else, start numbering employees from 1 and carry on as you capture more employees. eZee can also be set on the Setting screen to do automatic numbering.

Salary
Enter the amount the employee earns, if the pay category is monthly, enter the amount the employee earns per month, if the category is weekly, enter the amount the employee earns per week, and so forth. *Do take note of the following:*
For hourly paid employees, make sure to capture the hours worked on the Pay Details screen under the (Once Off) section before you pay them.
If the pay category is Commission or Basic + Commission, a field is displayed next to the pay category field where you have to type in the percentage commission an employee earns.
Commission gets calculated on the total value of work/sales where the employee is selected as the agent on the Income/Sales screen.
For Commission, don't enter an amount in the salary field, but for Basic + Commission; enter the basic salary in the salary field.

Pay Category
The pay category field is a drop-down box. This means you click on the ▼. A list is then display from which you select the desired option. The options are Basic + Commission, Commission, Daily, Fortnight, Hourly, Monthly, Twice per month and Weekly.

Date Started
As is the case with all dates in the system, you can not type in a date. Instead, click on the >> next to the date field and select a date from the calendar.

Tax period start
Enter the newest of either the date the employee started working for you or 1 March of the current year.

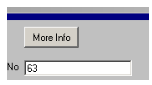
PAYE
If personal tax has to be calculated and deducted, tick the box next to PAYE.

Leave (days)
It is the number of days to be accumulated monthly, for example 1.5. The system will accumulate the number of days for every month from the date captured in the Date Started field.

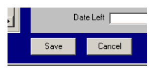
Sick leave
Number of days for every 36 month cycle, for example 30.

Date Left
In the event of an employee resigning, click and select the resignation date from the calendar. As soon as a date is entered here, the employee will no longer be listed in cases where an employee can be selected to be paid, etc.

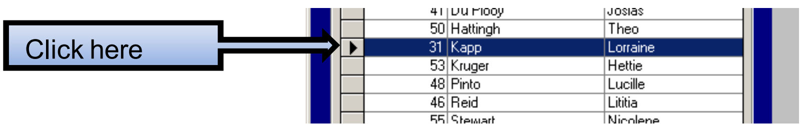
2 Click the More Info button to enter more info about the employee



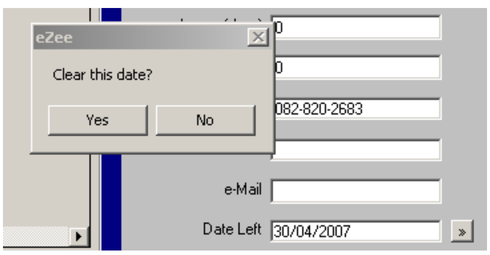
Once done entering all the staff information click on The "Save" button



3 Clicking on the "Resigned" button, shows a list of all resigned staff. To re-instate an employee, select the employee by clicking next to the name.

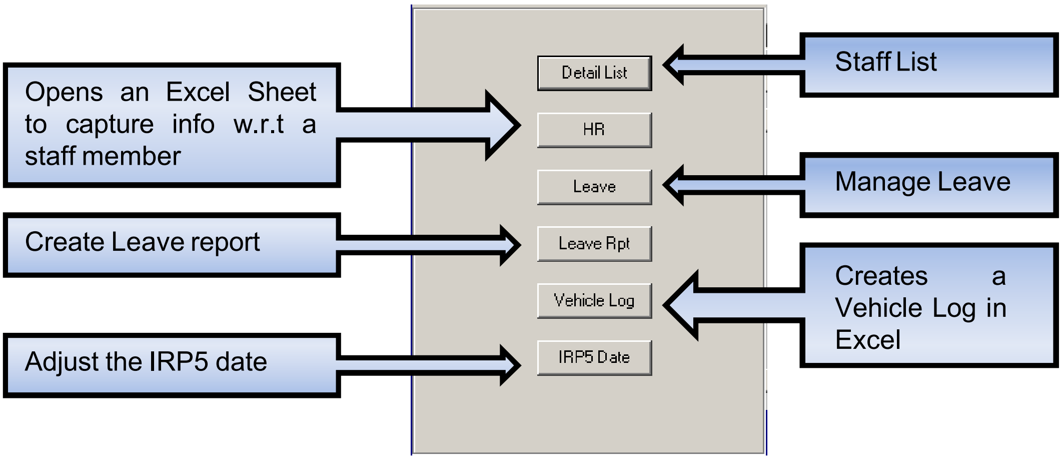


Click on "Edit". Then right click on the arrow button  next to "Date Left", and select to clear the date. The employee is now re-instated.



4 The “View” feature is currently not available. Future development to insert a staff picture

5 The “More” button allow access to the following features:



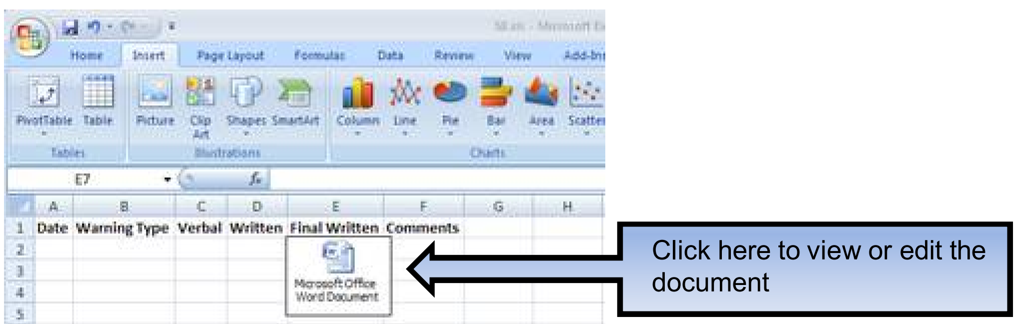
Before clicking on this button, make sure the right employee is selected.

Type in the date, type of warning, etc. Then click on the relevant column, e.g. written, final written, etc.

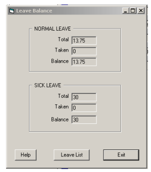
Now, at the top of the screen, click on Insert and select Object. On the screen that appears, tick the Display as Icon box, and then scroll down to select Microsoft Word Document. Click on OK.

Type the letter or warning and close Microsoft Word. You do not have to save, it is done automatically. This will take you back into Excel. Now close Excel, and select Yes when asked if you want to save.

Once you have documents linked to an employee, you will see something like the following when clicking on HR:



Leave

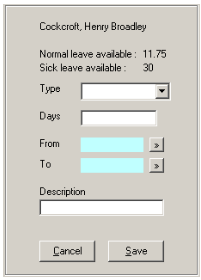


Before clicking on this button, make sure the right employee is selected. This screen will show you how many days sick and normal leave an employee has left. .

Leave List

To add leave records, click on Leave List. The leave balance is automatically updated.

Click on "Add"
Select the employee.
Complete the information.



Click on "Save".

Click on "Exit" to return to the "Staff Master Info" screen.

IRP5 Date

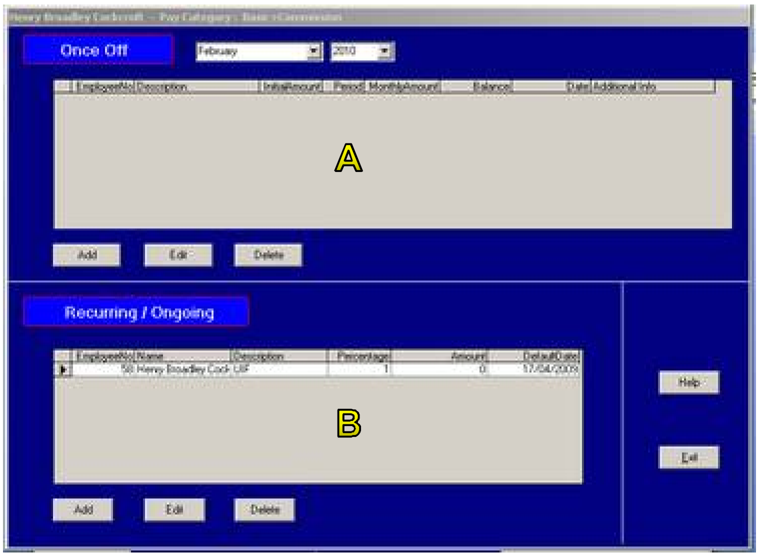
Adjusts the IRP5 date for all employees to the 1st March of the current year. This must be done every year after the 1st of March.

2 "Pay Details" allows one to structure a staff members pay. There are two sections on this screen, namely **Once Off** and **Recurring / Ongoing**. The Once Off payments with a date falling in the month displayed at the top of the screen are listed and all regular payments, irrespective of the date, is listed under Recurring / Ongoing.

> Note that when you pay an employee, ALL recurring and ongoing payments and deductions are used, but only once off payments and deductions not processed fully are used, irrespective of the date, but excluding those with a date later than the payment date.

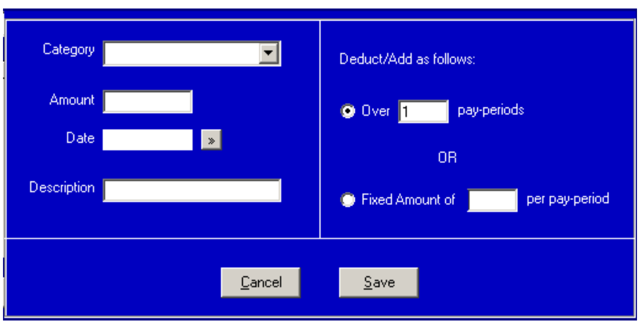
When talking about Pay Periods or Pay times, it means Months for monthly paid employees, Weeks for weekly paid employees; Fortnight for employees paid every fortnight, etc.

Click Pay Details to add additional payments and deductions. Make sure the is next to the employee for which you want to add pay details.



A Once of Payments

Payments and deductions like overtime, loans, etc., that has to be processed and then ignored, are captured under Once Off.
Once Off payments or deductions can, however, be processed over a period, but must still be ignored once processed fully. An example here is like a staff loan which is deducted over a number of pay periods.



- Click Add to add a new record or Edit to change an existing record.
- Click on the ▼ of the drop-down box and select the category
- Type the amount in the amount box.
- Click next to the date on the calendar command and select a date.
- Description is not compulsory, and does not have to be completed.
- In the right hand side of the frame, choose how the amount must be paid or deducted.
- If Over Period is used the initial amount will be divided into the number of pay periods entered.
- If Fixed Amount is used, enter the amount to be paid or deducted every time the employee is paid.
- Click Save to save the information entered.

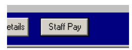
B Recurring / Ongoing

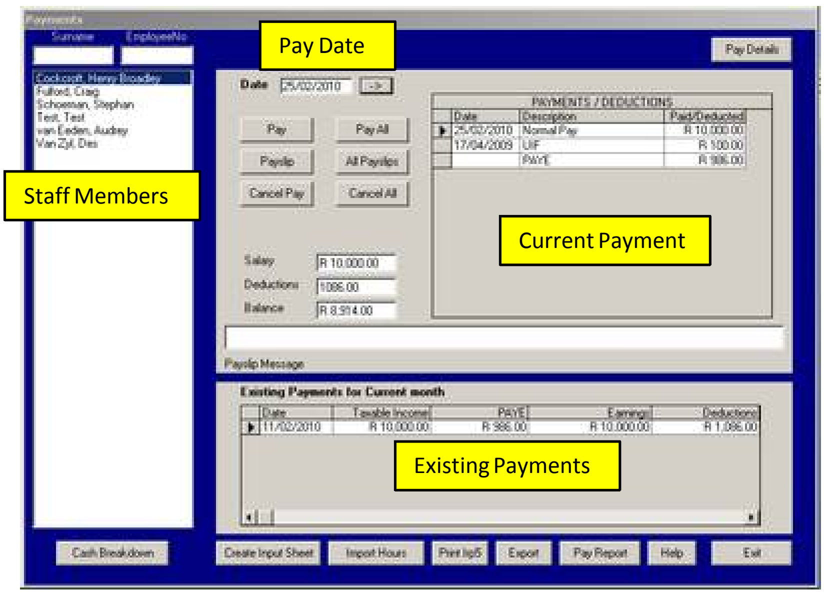
Payments and deductions that have to be paid or deducted repeatedly, every time an employee is paid, are captured here. Examples would be UIF, Home Allowance, Travel Allowance, Pension, Group Life, etc.

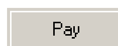
Any payment or deduction listed here will be processed on an ongoing basis, until you delete it from the list.

> *Note: Other Payments and Other Deductions will show what you captured in the Description field on the Pay slip.*

7 "Staff Pay" is used to do the actual salaries of the staff members and to generate pay slips.







- Select the staff member
- Select the payment date
- Click Pay
- Check the salary details in the "Current Payment" window
- If all is correct click "Payslip"

You can click on the pay button more than once – the system will not do duplicate payments.

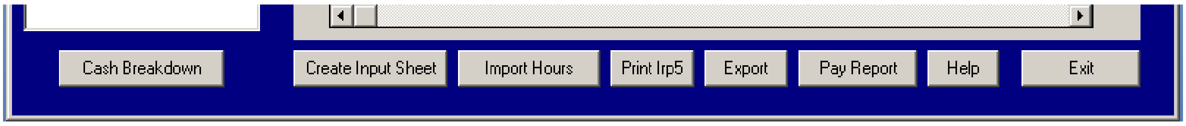
All that happens when you click the pay button more than once for the same date and the same employee, is that the information gets refreshed. ***In other words, the system checks to see if you added or removed pay information and then refreshes the pay record.***

Remember thus to click on the pay button again if you have changed pay information for an employee for a specific pay time. If you don't, the changes will reflect the next time you pay the employee.

Click Cancel Pay to erase a pay record.

Cancel Pay

To delete an existing record reflected in the grid of Existing Payments, change the date at the top to the desired date, select the employee and click on Cancel Pay.



Additional Buttons

Cash Breakdown — Break down of cash needed in order to do salary pay out.

Create Input Sheet / Import Hours — Create a time sheet with regards to hours worked and importing it into the software in order to calculate wages for staff working on a hourly rate.

Print Irp5 — At the end of the financial year or when an employee resigns, click here to print an IRP5.

Export — Exporting the pay information to an Excell Spreadsheet.

Pay Report — Report on staff salaries – all payments and all deductions.

Exit — Exit to "Staff Master Info" screen