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International



SiriusAPP



DynamicAI

SiriusPayroll365 Demo Portal

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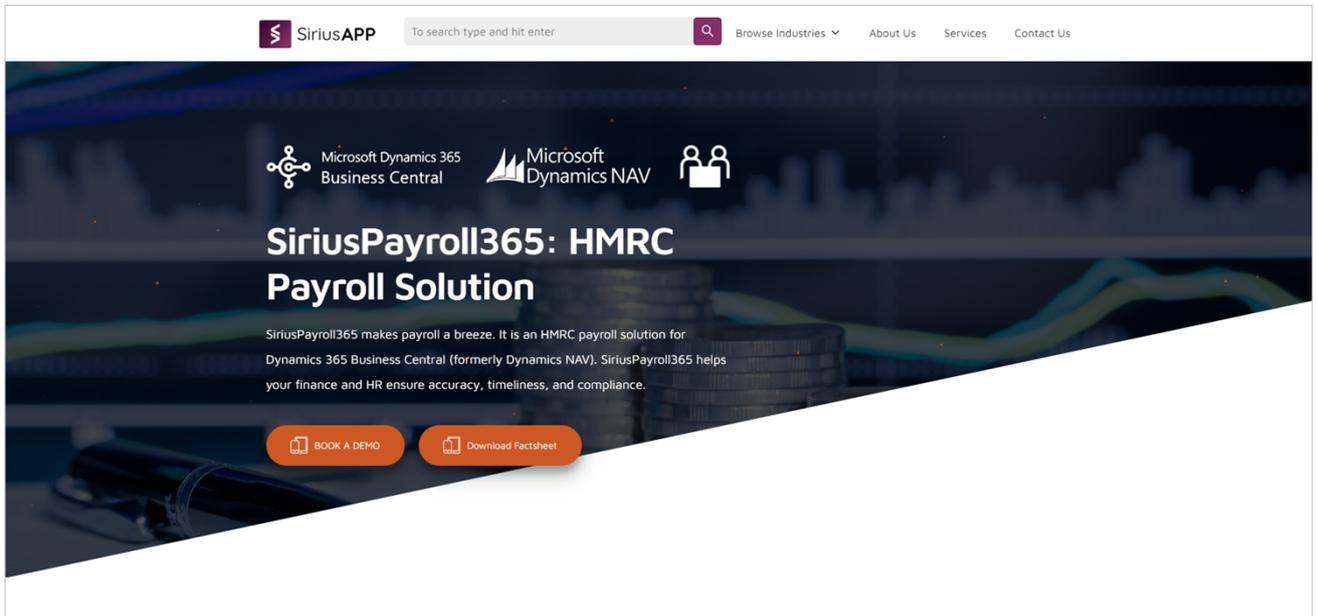
Thank You

1. SiriusPayroll365

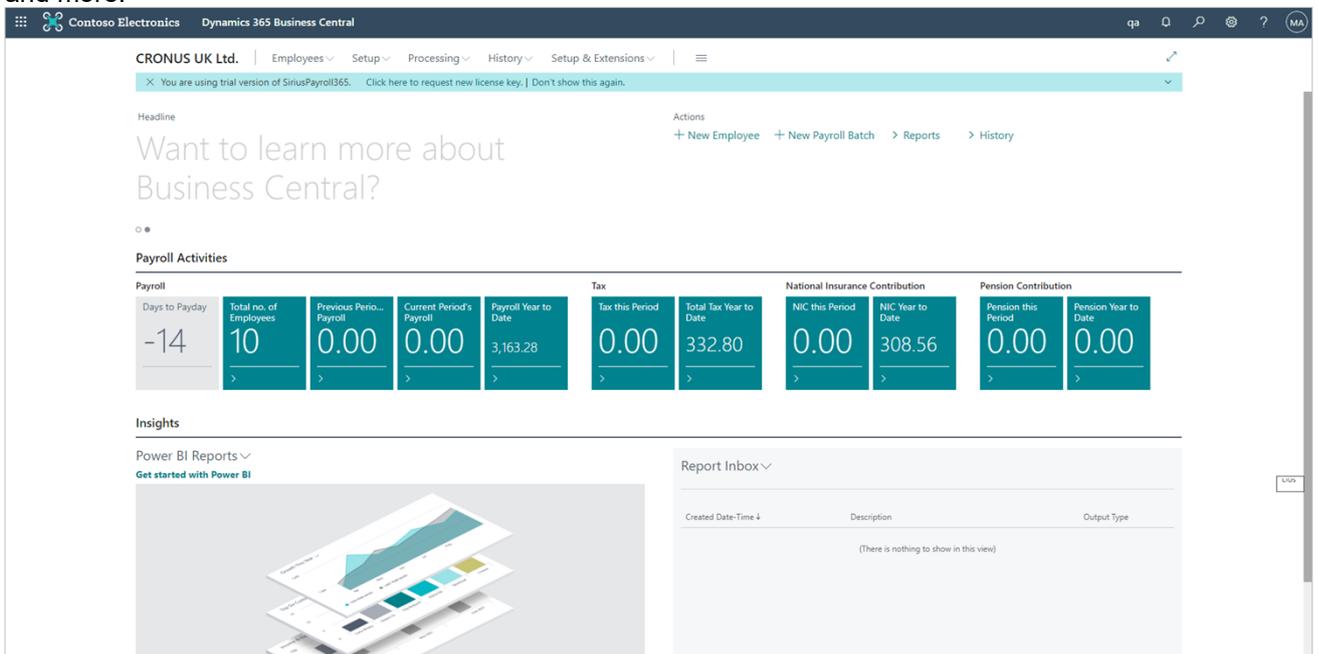
1.1. Overview

SiriusPayroll 365 integrates seamlessly with Microsoft Dynamics 365 Business Central and is HMRC recognised. It lets you collect, manage, store and share your employee data securely. The way it does that is by capturing data from Business Central and enabling the complete payroll process. Information such as employee salary, pensions, national insurance, statutory payments, and deductions can be seen inside SiriusPayroll 365. It also lets you print cheques, which can be sent directly to your employees.





Few things to note here is that, SiriusPayroll365 links to HMRC to automate submissions and validate employee information, which ensures you submit accurate data to HMRC and meet the RTI (Real Time Information) requirements. It automates manual paperwork and reduces human errors. It enables you to pre-process payments regarding pensions, overtime, sickness, contracted hours, insurance, maternity, paternity, and more.

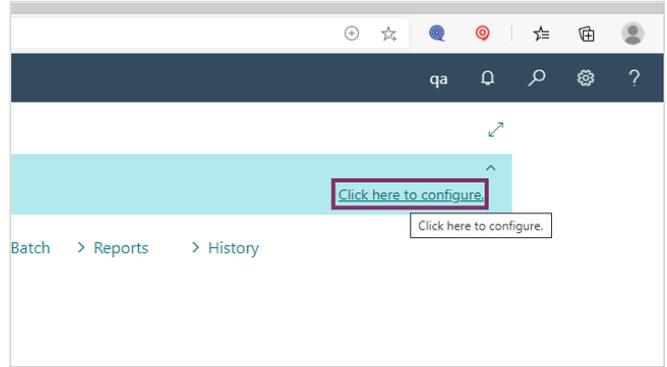


Now that we have an overview of SiriusPayroll365, let's move on to the Configuration.

1.2. Configuration

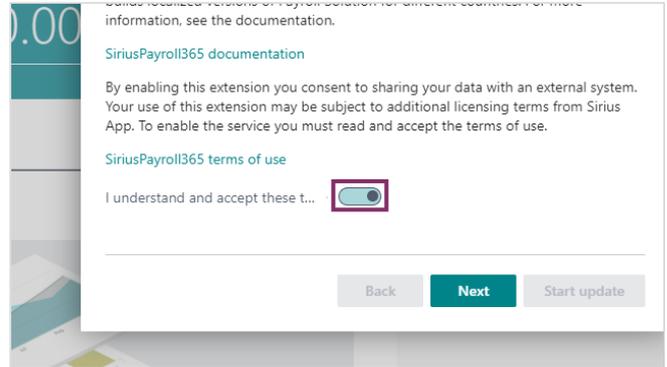
When we first login to our SiriusPayroll 365 environment, you will be able to see notifications in your Role Center. The notifications are easy to detect, as they are highlighted. You will notice that the initial notification says 'The SiriusPayroll365 extension has been installed but not configured.' Let's go ahead and see how we can configure out SiriusPayroll365 extension.

Select the 'Click here to configure' link.

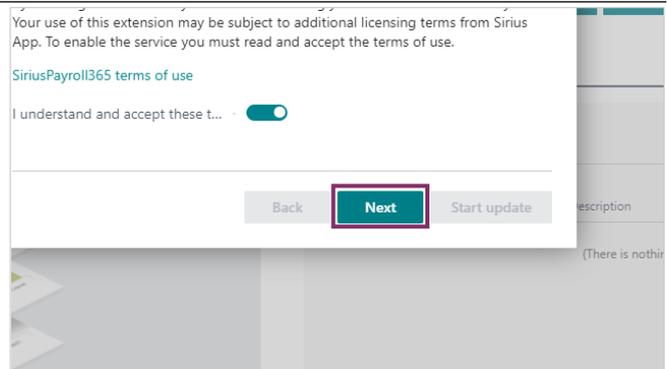


The first prompt you will see, is the Terms and Conditions. You will be required to accept these Terms and Conditions before proceeding with the Configuration.

Click on the toggle field 'I understand' and accept these terms.

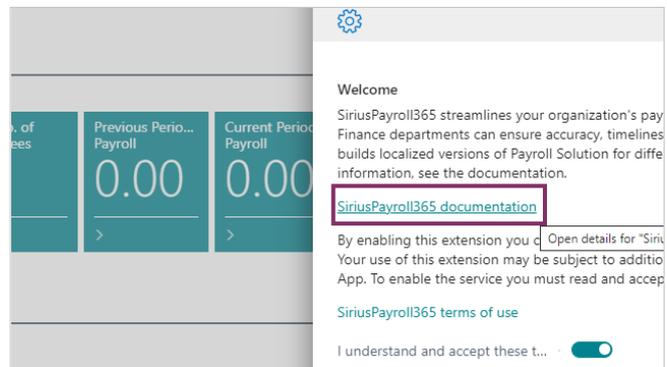


After that, click Next.



You may wish to review the content under our Terms and Conditions,

Click on the link 'SiriusPayroll365 documentation'.

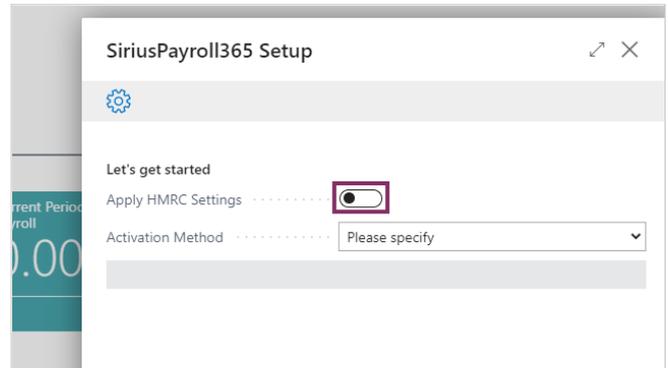


This will redirect you to another link, from where you can read the Terms and Conditions before accepting or denying it.

Moving ahead, since SiriusPayroll365 is HMRC Compliant, the setup that is defined by the HMRC Government applies to our extension.

Now, let's go ahead with our configuration.

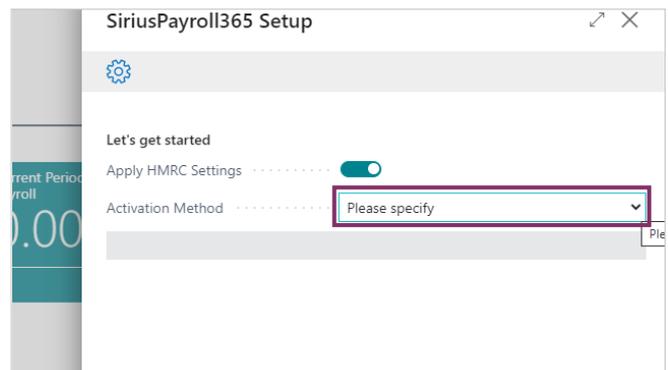
Click on the toggle field 'Apply HMRC Settings.'



One thing to note here, is that, with updates to our SiriusPayroll365 extension, any new HMRC rules are updated as well. Whether organizations want to apply these new rules or not, is dependent on them. The toggle can be marked 'False' for Apply HMRC Settings if you do not wish to use the new rules as per the update.

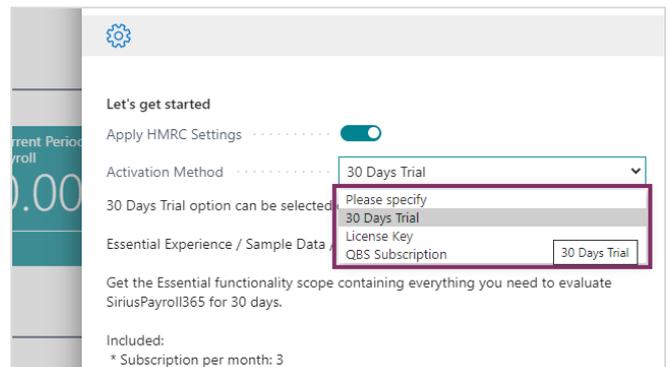
The next step, is to select the Activation Method. This must be selected, before we move on to use the applicaiton.

So, click on the drop-down.



On doing this, you will find the 3 Activation mentods available. -30 Days Trial, -License Key, and QBS Subscription. Let's start with the first option.

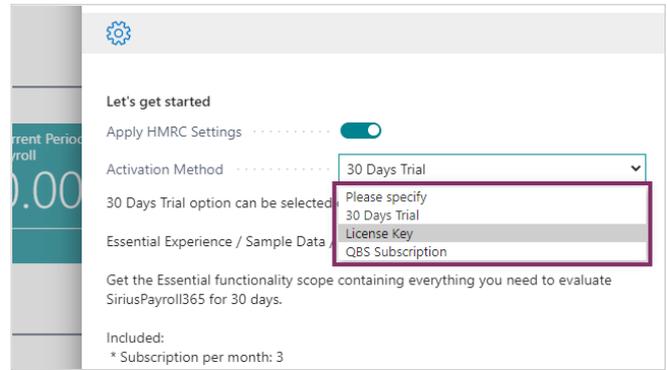
Select 30 days trial from the list.



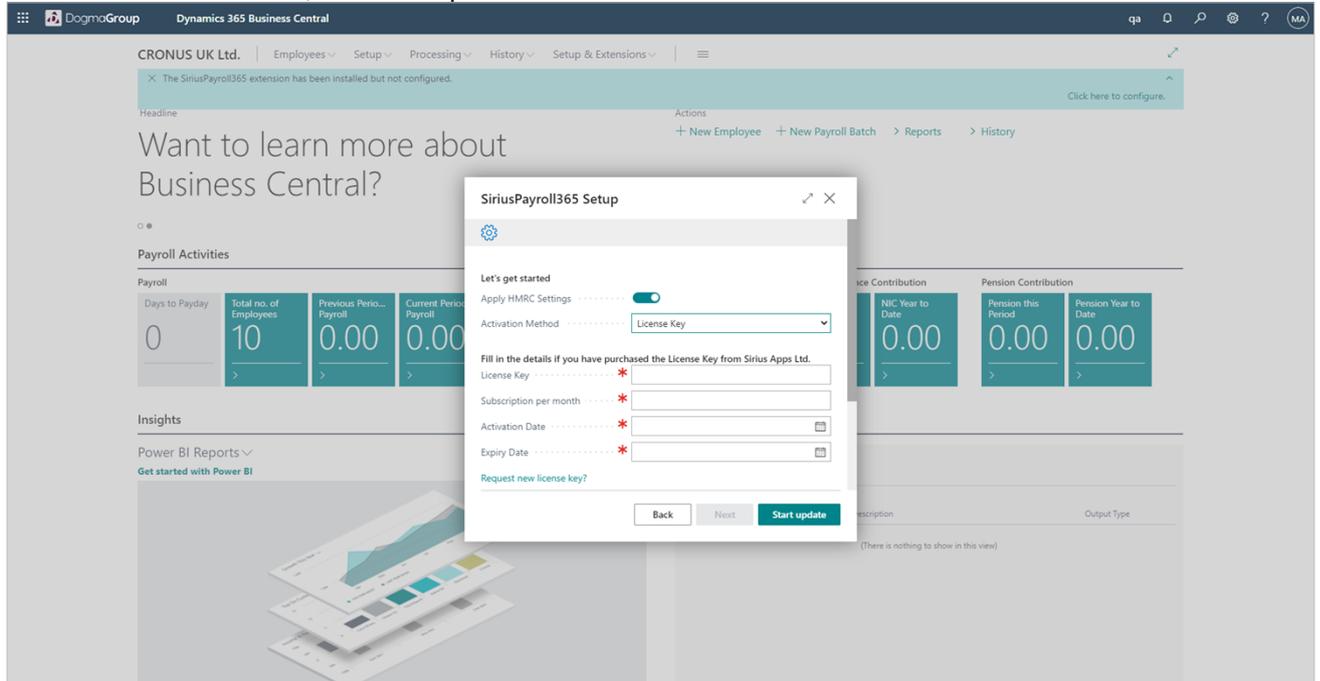
This option will allow you to use the full experience of SiriusPayroll365, you will be provided with Sample data, as well as Setup data. The validity of this activation is 30 days. In the 30 days trial, you will be able to generate payroll documents, and post them, for a total of 3 employees within 30 days. An important point to note here is that, on exceeding the number of employees, the subscription will be terminated.

The next activation method, is the Lisense Key.

Select License Key from the list.

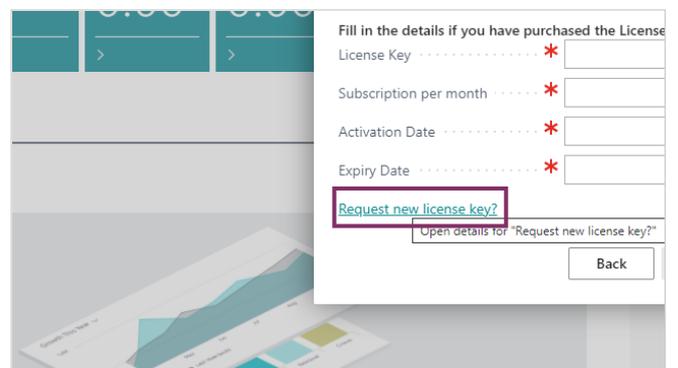


The License Key needs to be purchased from the Sirius App. If you have already purchased the key, you can enter the details in the fields shown. Notice that all the fields are marked with a red asterisk, which means that without these information, we cannot proceed with this activation method.

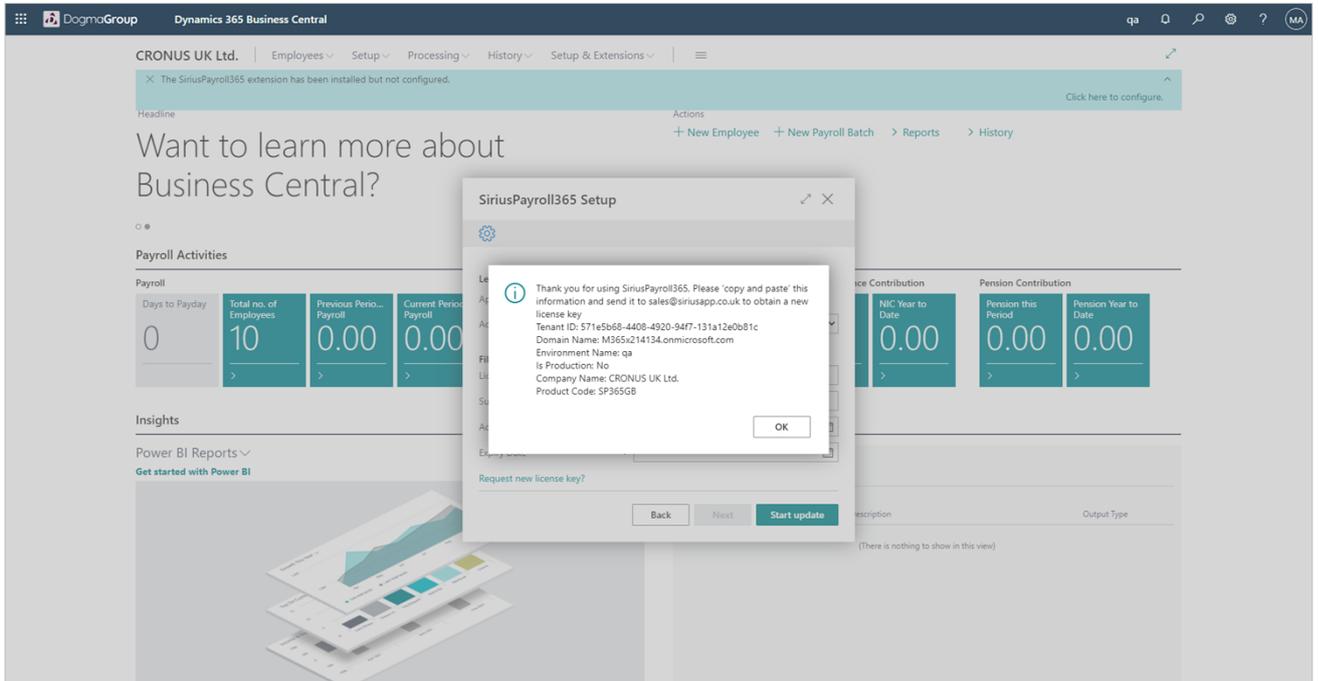


If you do not already have the License Key, but are interested in getting on through us, you can do the following.

Click on 'Request New License Key?'

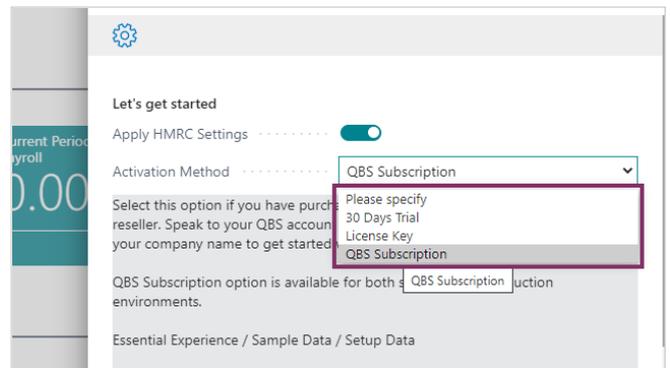


You will now be able to see details of your Domain Name, Tenent ID, Environment Name, Company Name and the Product code. All of these information can simply be copied and sent in to sales@siriusapp.co.uk. One of our Sales Consultants will reach out to you once you do this.



Now, let's explore the final Activation method.

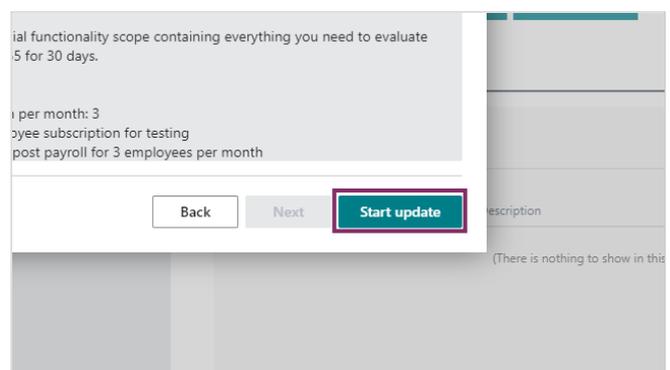
Select QBS Subscription from the list.



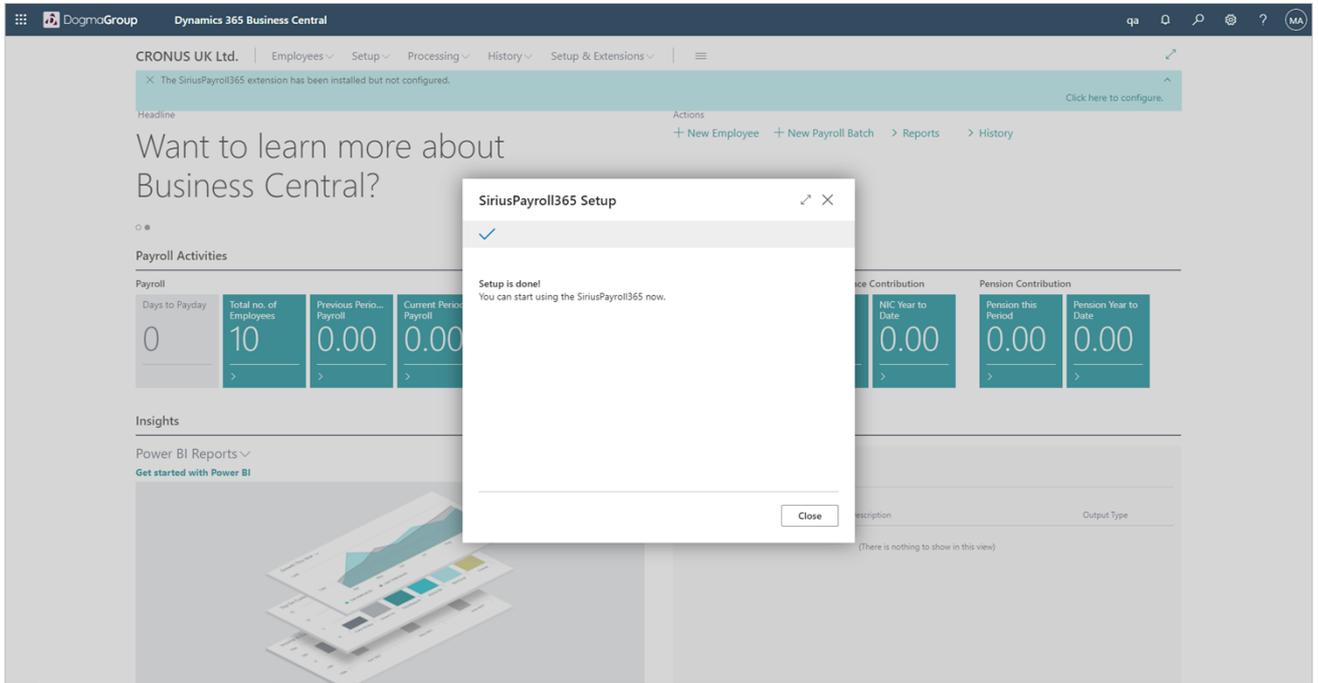
For existing partners, if QBS Subscription is used, the SiriusPayroll365 will be automatically activated.

Once you have decided on the Activation method, you can go ahead with completing the configuration.

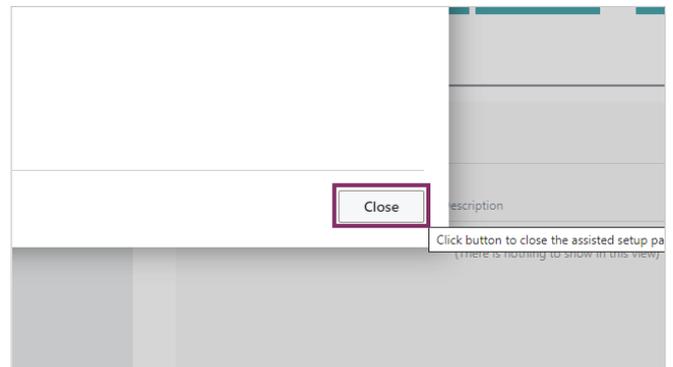
Click on Start Update.



Once the Setup is complete, you will see a dialogue box.



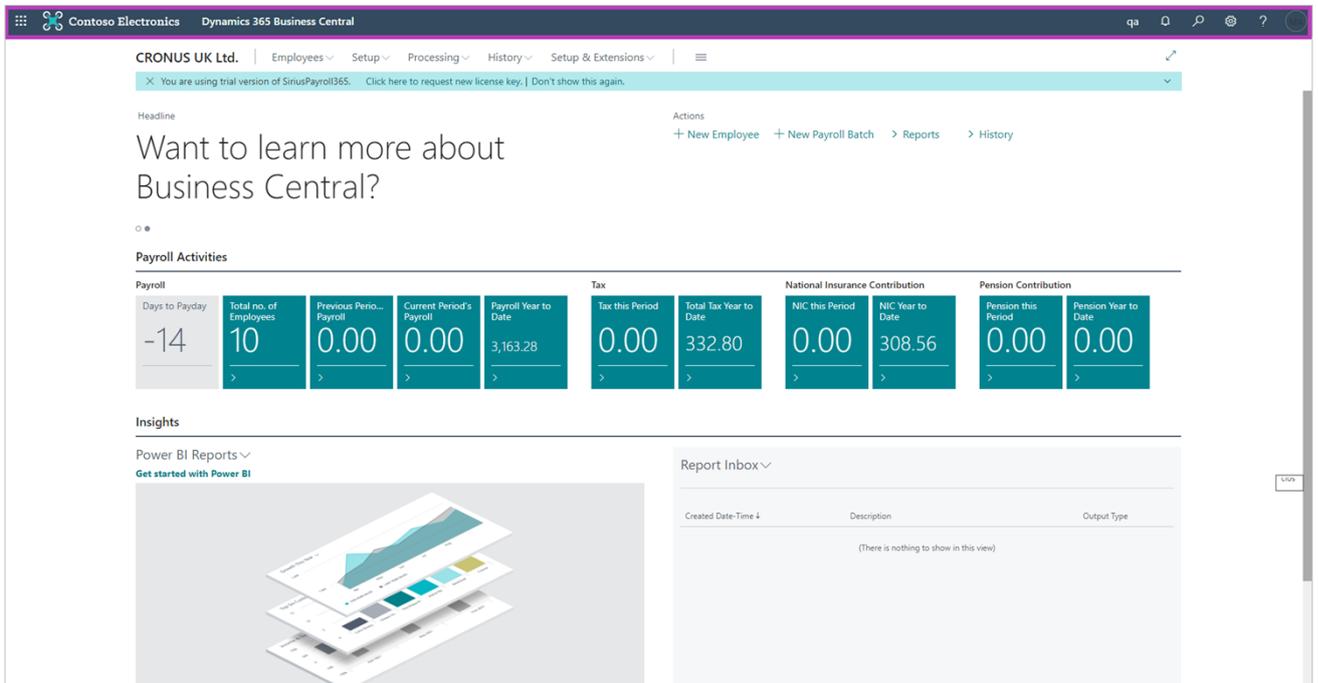
Click on Close.



You are now ready to use the SiriusPayroll365. Let's explore the various actions and activities available in SiriusPayroll365 in the upcoming chapters.

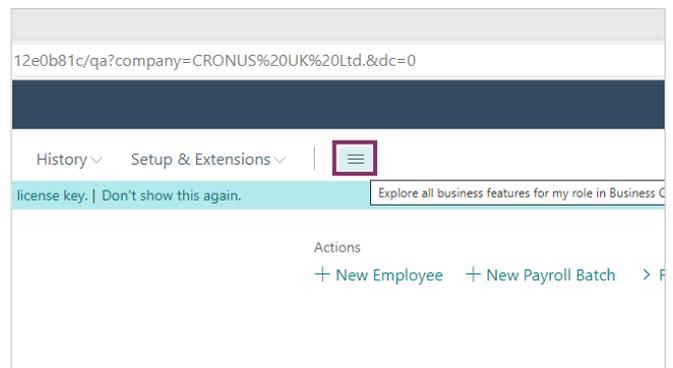
1.3. Navigation

When you enter the system, the first thing you will see is that we have landed on Business Central. The top black navigation bar houses the notification, search button, help button and basic settings where you can personalize payroll as well as, perform advanced settings.



Just below the black bar, you will see five different tabs: Employees, Setup, Processing, History, Setup & Extensions. Next to the five tabs, you will see a button made up of three horizontal lines.

Click on it.

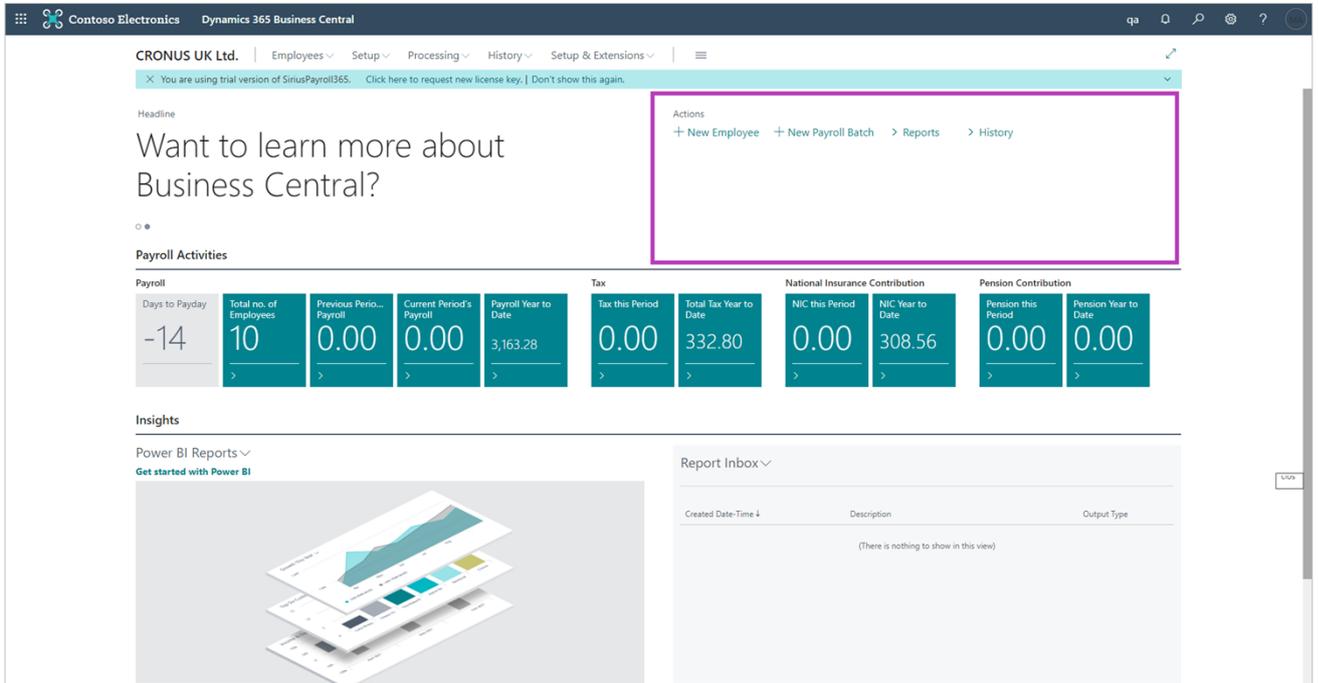


Once you do that, you will be greeted with a page containing all the subtabs of the previously mentioned five tabs, which will make it easy for you to navigate where necessary from the same page.

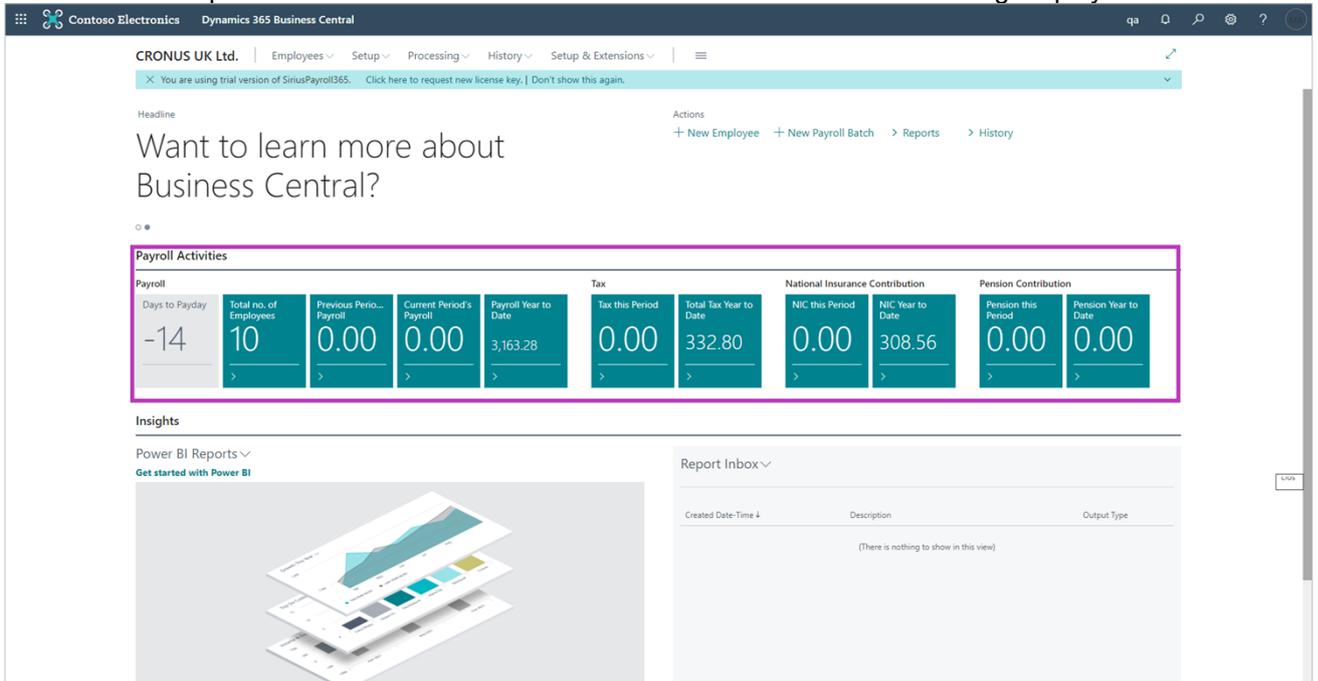
To return to the home page, click on the arrow on the extreme left.



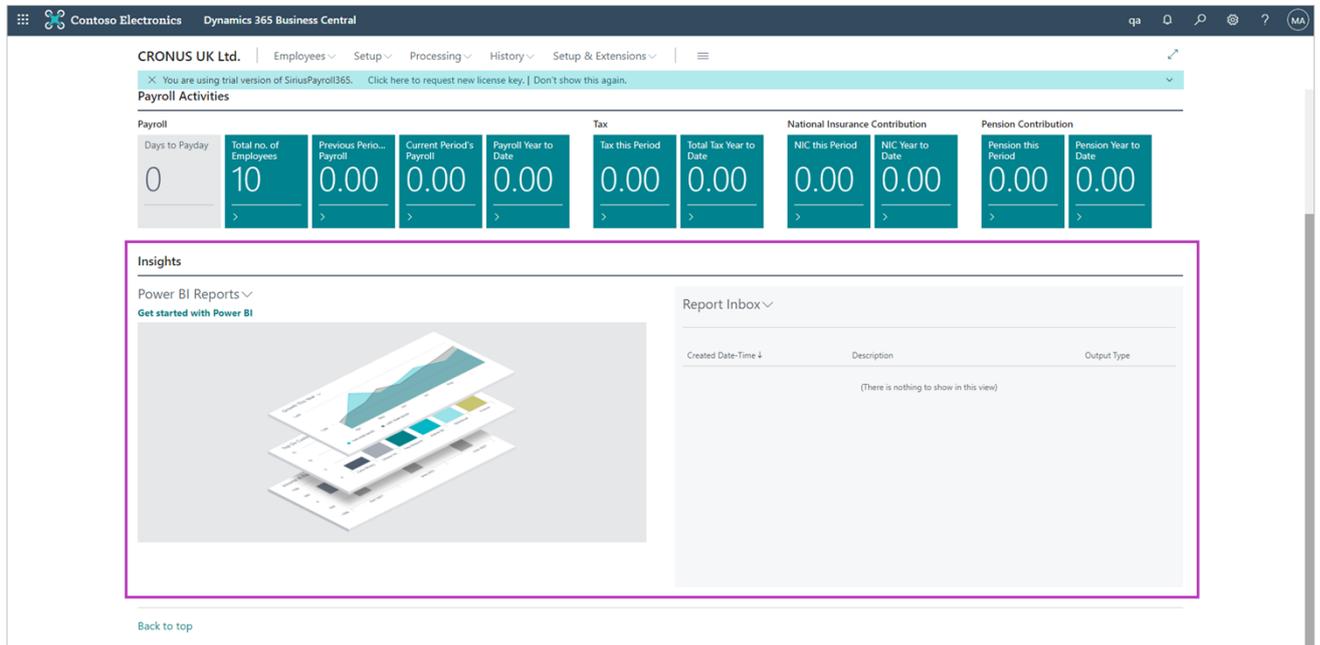
Now, we can see three different sections. -The first section on the right side of the screen is 'Payroll Actions.' This is where different functions like 'Adding a New Employee,' 'Adding a New Payroll Batch,' and viewing reports as well as history is done.



-The second section is 'Payroll Activities' where its further divided into, payroll, tax, National Insurance Contribution and pension contribution. This is where we can see details of the exiting employees.



-Then the third section is 'Insights.' This is where the Power Platform integration plays an important role with using 'Power BI' to view and monitor reports.



This gives a basic navigation to the SiriusPayroll365 interface, now, let's look into a few important functions within the sections mentioned above.

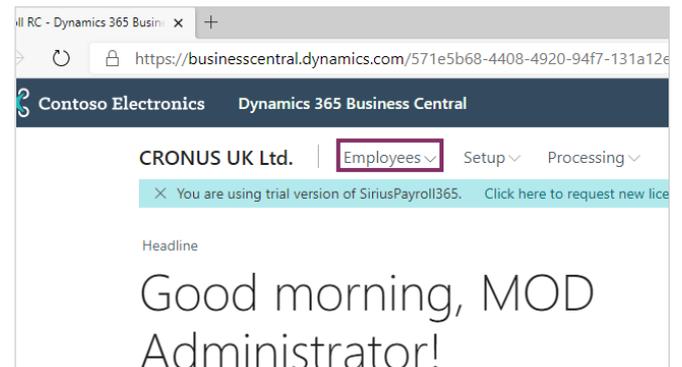
1.4. Tabs (Navigation Panel)

This section contains details on the topmost navigation panel, which contains five main tabs: Employees, Setup, Processing, History and Setup and Extensions. Setup and Extensions is an out of the box feature of business central, so lets focus on the remaining four tabs.

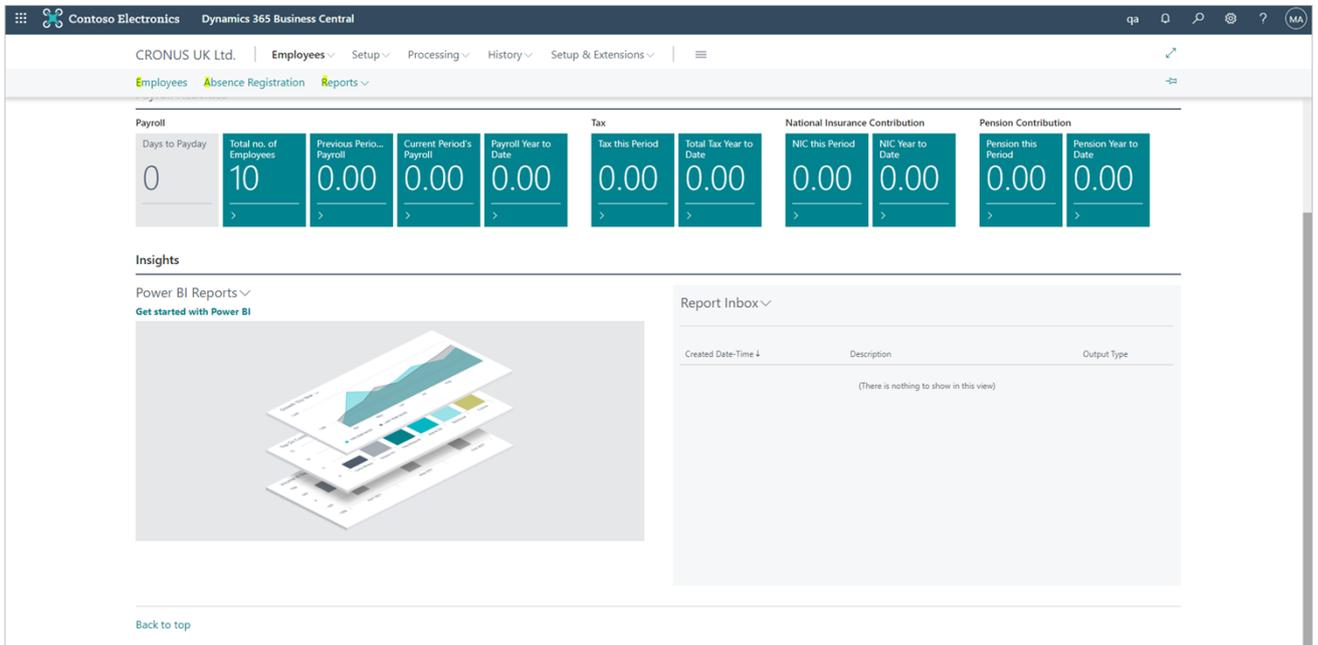
1.4.1. Employees

The first tab is Employees, where all the information of the employees are stored.

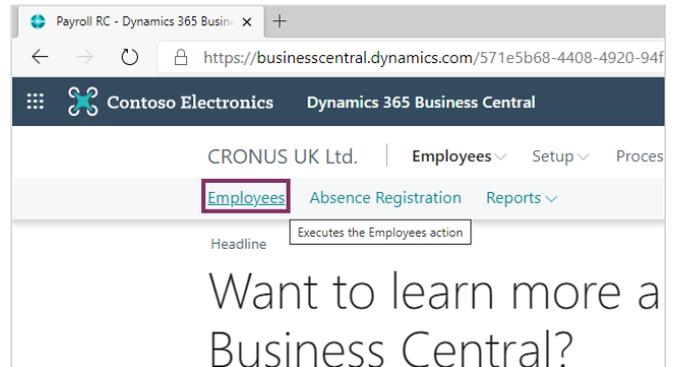
Lets click on the tab.



Once we do that, we can see three different sub-tabs: Employees, Absence Registration and Reports.

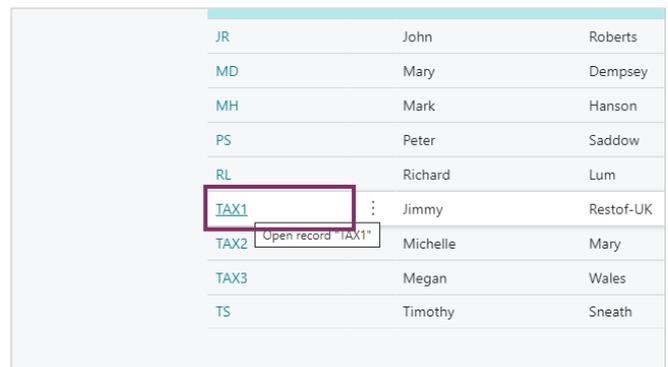


Click on the first sub-tab, which is 'Employees.'



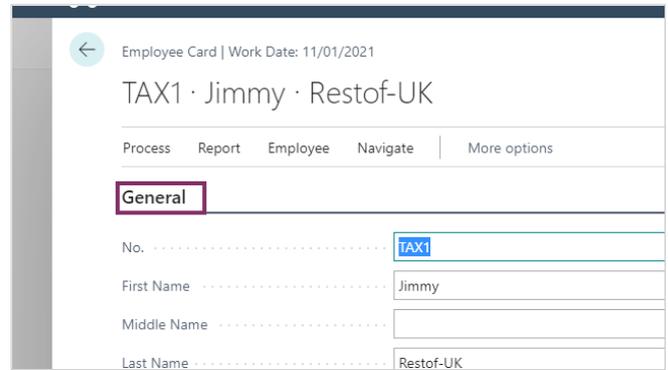
This is basically where all the information of the employees are stored in order to calculate the salary. If we look at the list closely, we can see three sample employees. Lets click on their employee tax no. to see their information details.

Click on the employee number of Jimmy.



This opens the employee card of Jimmy, where all his details are stored. The employee card contained his general information as well as his address, etc.

Lets click on 'General' to collapse the section.



Similarly, lets click on 'Address and Contact' to collapse this section as well.



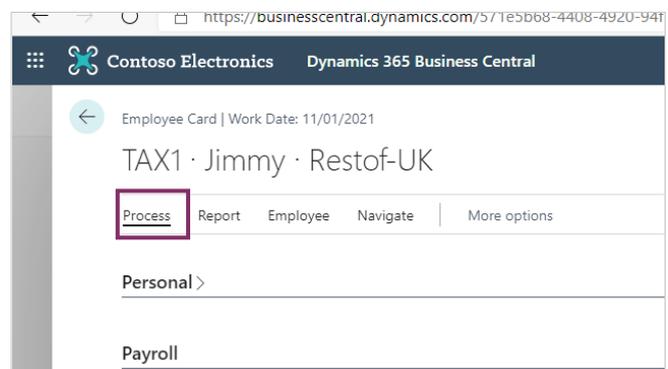
Then, click on the 'Payroll' tab to maximize, as we focus on this section.



Within this tab, there are a few important details to setup a certain method of payroll activity. For example, if your company has a certain pay level or pay grade, the setup can be done here. Similarly, the frequency, tax area code, HMRC tax code, as well as the pay unit can be set here.

Now, if we look on the top of this employee card, right below the name of the employee, we can see a few tabs.

Click on the first tab, which is 'Process.'

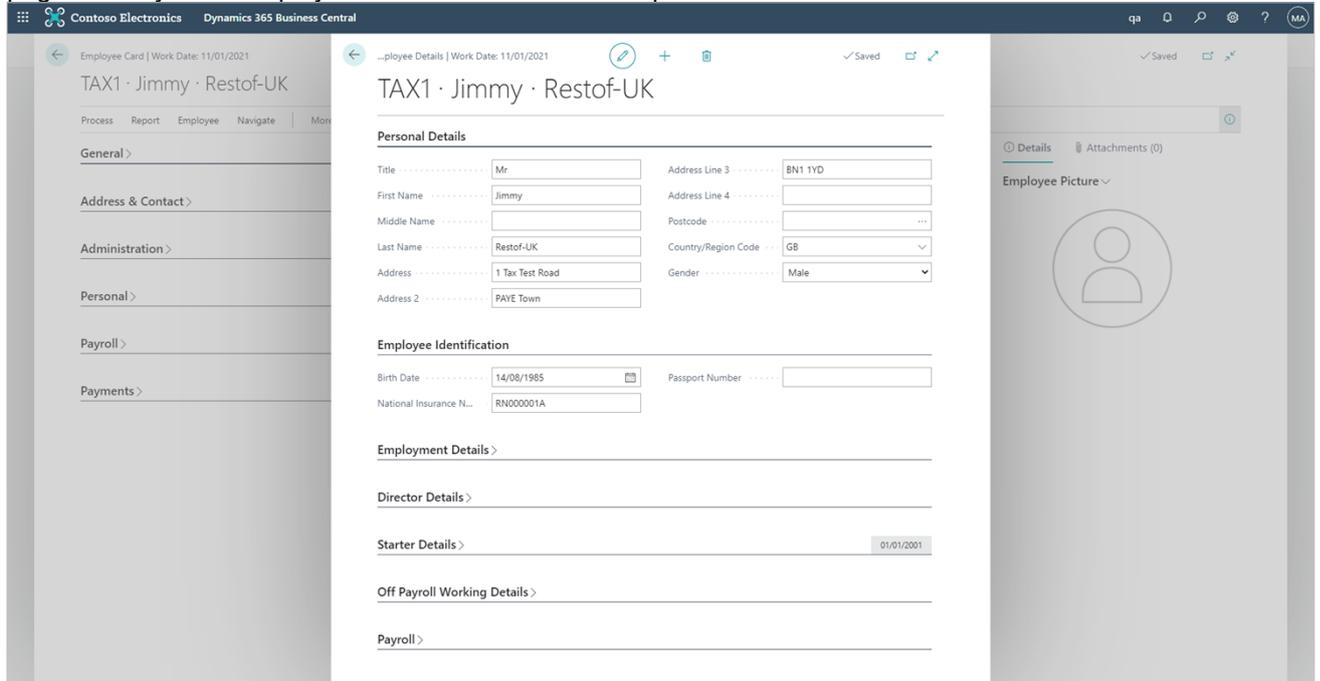


This further opens up sub-tabs.

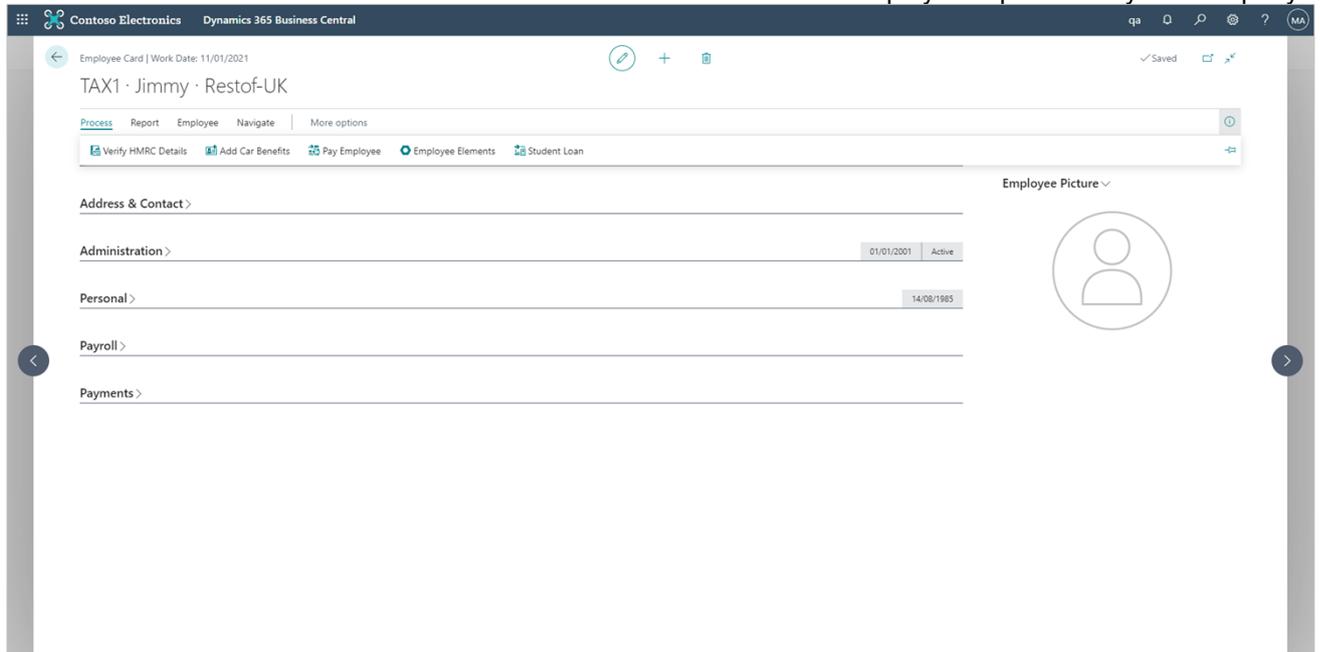
Here, click on 'Verify HMRC Details.'



This is one of the most important section where all the information that HMRC looks for is stored. These information should be accurate, as this is what is sent to HMRC as full payment submission. So, this is the page to verify if the employee details are correct and up to date.



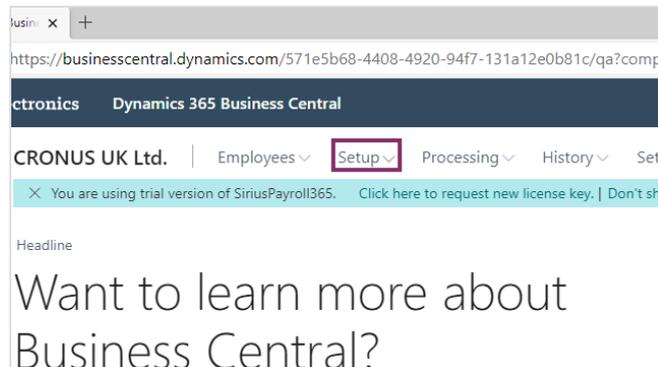
Similarly, if you look into other existing tabs within 'Process' in the employee card, car benefits, student loan, and others are sections which contain details on different benefits if the employee is provided by the company.



1.4.2. Setup

The second tab is 'Setup,' where all the necessary setups are categorized within for ease of access.

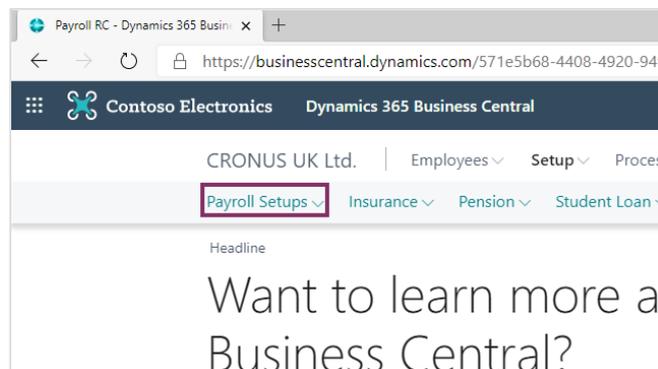
Click on the 'Setup' tab.



So again, we can see subtabs: Payroll setups, Insurance, Pension, S0tudent Loan, Statutory Payments/ Leave, HMRC Integration, Timesheet setups, HR Setups. HR Setups is an out of the box functionality of Business Central, so lets focus on the remaining tabs.

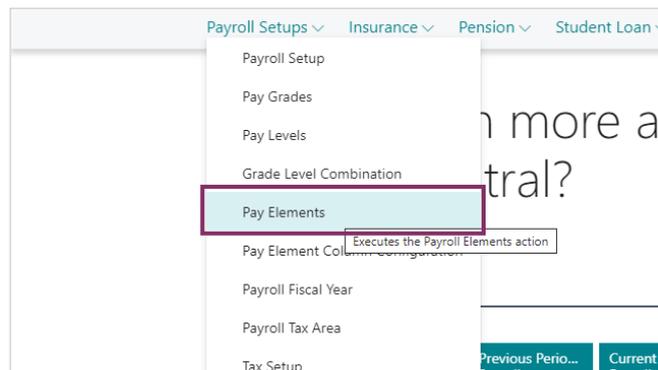
1.4.2.1. Payroll Setups

Click on 'Payroll Setups.'



This opens up a list of payroll setups. Pay Grades, Pay Levels and Grade Level Combination are the setups you are looking for, if your company has a certain pay level setup. We can move on to the rest of the subtabs.

So, from the list, click on 'Pay Elements.'



Doing that opens up a long list of pay elements that are provided by the company. One very imporant point to note here is that, these are felexible. You can choose if the pay element is taxable, whether to include it in the pension details or not, whether to include it in the insurance calculations or not, whether to include it in student loan calculations or not. So, this gives you the option to choose as per your requirements of the company or government policy.

Contoso Electronics Dynamics 365 Business Central

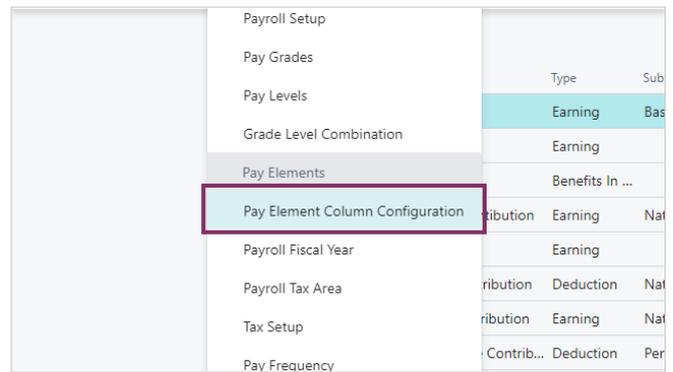
CRONUS UK Ltd. | Employees Setup Processing History Setup & Extensions

Pay Elements: All Search + New Delete Edit List Page

| Code 1 | Description | Type | Subtype | Additional Category | Incl. in Tax... | Incl. in Pen. Cal... | Incl. in Issu. Cal... | Incl. in Stu. Loan | Account Type | Account No. | Column Name | Column No. | For... | Tax Exemption | Allow edit per em... |
|----------------|-----------------------------|-----------------|-------------------|-------------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------|-------------|-------------|------------|--------|---------------|----------------------|
| BASIC | Basic Salary | Earning | Basic Salary | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | G/L Account | 30700 | A | 1 | | 0.00 | |
| BONUS | Bonus Pay | Earning | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | G/L Account | 30800 | H | 8 | | 0.00 | |
| CAR ALLOWANCE | Car Allowance | Benefits In ... | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | G/L Account | | I | 9 | | 0.00 | |
| CLASS 1A NI+ | Class 1A NI Er Contribution | Earning | National Insur... | Employer Contribution | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 31300 | S | 19 | | 0.00 | |
| LEAVE PAY | leave pay | Earning | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 31500 | W | 23 | | 0.00 | |
| NI- | NI Employee Contribution | Deduction | National Insur... | Employee Contribution | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 56120 | B | 2 | | 0.00 | |
| NI+ | NI Employer Contribution | Earning | National Insur... | Employer Contribution | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 31300 | C | 3 | | 0.00 | |
| P- | Pension Employee Contrib... | Deduction | Pension | Employee Contribution | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 31400 | D | 4 | | 0.00 | |
| P+ | Pension Employer Contrib... | Earning | Pension | Employer Contribution | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 31500 | E | 5 | | 0.00 | |
| PAY ADJUSTMENT | salary adjustment | Earning | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | G/L Account | 31500 | U | 21 | | 0.00 | |
| PGL | Post Graduate Loan | Deduction | Student/PG Lo... | Post Graduate | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 30700 | L | 12 | | 0.00 | |
| REDUNDANCY | REDUNDANCY | Earning | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 31500 | V | 22 | | 0.00 | |
| SAP | SAP | Earning | Statutory Pay... | Statutory Adoption Pay - SAP | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 51500 | N | 14 | | 0.00 | |
| SHPP | ShPP | Earning | Statutory Pay... | Shared Parental Pay - ShPP | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 51500 | P | 16 | | 0.00 | |
| SLP1 | Student Loan Plan 1 | Deduction | Student/PG Lo... | Plan 1 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 30600 | J | 10 | | 0.00 | |
| SLP2 | Student Loan Plan 2 | Deduction | Student/PG Lo... | Plan 2 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 30400 | K | 11 | | 0.00 | |
| SMP | SMP | Earning | Statutory Pay... | Statutory Maternity Pay - SMP | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 51500 | O | 15 | | 0.00 | |
| SPBP | SPBP | Earning | Statutory Pay... | Statutory Parental Bereavement Pay - SPBP | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 51500 | Q | 17 | | 0.00 | |
| SPP | SPP | Earning | Statutory Pay... | Statutory Paternity Pay - SPP | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | G/L Account | 51500 | R | 18 | | 0.00 | |
| SSP | SSP | Earning | Statutory Pay... | Statutory Sick Pay - SSP | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 51500 | M | 13 | | 0.00 | |
| TAX | Tax | Deduction | Tax | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 30300 | G | 7 | | 0.00 | |
| TERMINATION | Termination Award | Earning | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | G/L Account | 30800 | T | 20 | | 30,000.00 | |

Now, lets move on to the next subtab under payroll setups.

Click on 'Pay Element Column Configuration.'



This opens up one of the main configuration pages for administrator users. All the columns that you will be using to setup the payroll processing, will be difined within this subtab.

Contoso Electronics Dynamics 365 Business Central

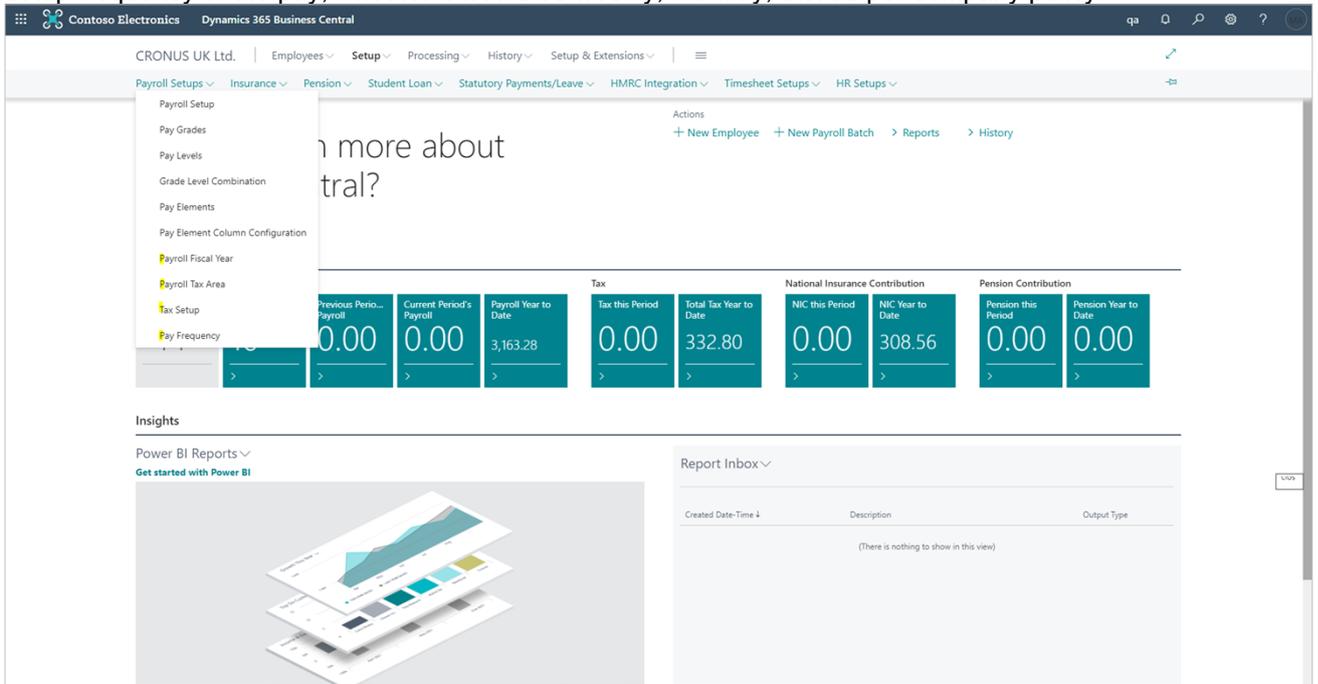
CRONUS UK Ltd. | Employees Setup Processing History Setup & Extensions

Pay Element Column Configuration: All Search + New Delete Edit List Page

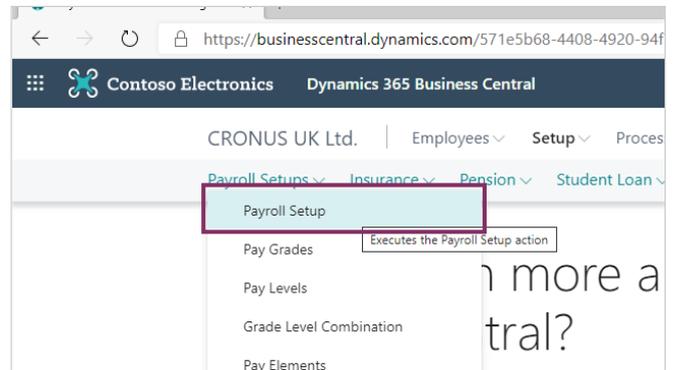
| Table No. | Field No. | Variable Field Code |
|-----------|-----------|---------------------|
| 70702583 | 5501 | BASIC |
| 70702583 | 5503 | CAR ALLOWANCE |
| 70702583 | 5504 | BONUS |
| 70702583 | 5505 | TERMINATION |
| 70702583 | 5506 | SLP1 |
| 70702583 | 5507 | SLP2 |
| 70702583 | 5508 | PGL |
| 70702583 | 5509 | CLASS 1A NI+ |
| 70702583 | 5510 | NI- |
| 70702583 | 5511 | NI+ |
| 70702583 | 5512 | P- |
| 70702583 | 5513 | P+ |
| 70702583 | 5514 | PAY ADJUSTMENT |
| 70702583 | 5515 | SAP |
| 70702583 | 5516 | SHPP |
| 70702583 | 5517 | SMP |
| 70702583 | 5518 | SPBP |
| 70702583 | 5519 | SPP |
| 70702583 | 5520 | SSP |
| 70702583 | 5521 | REDUNDANCY |
| 70702583 | 5522 | LEAVE PAY |
| 70702583 | 5530 | TAX |

Moving on, the next few subtabs are equally imporant in setting up a payroll process as per HMRC rules. - Payroll Fiscal Year is to setup the fiscal year for the payroll processing. - Payroll Tax Area is to setup the specific area of which the tax policy will be used. - Tax setup would be the setup to define the setup details

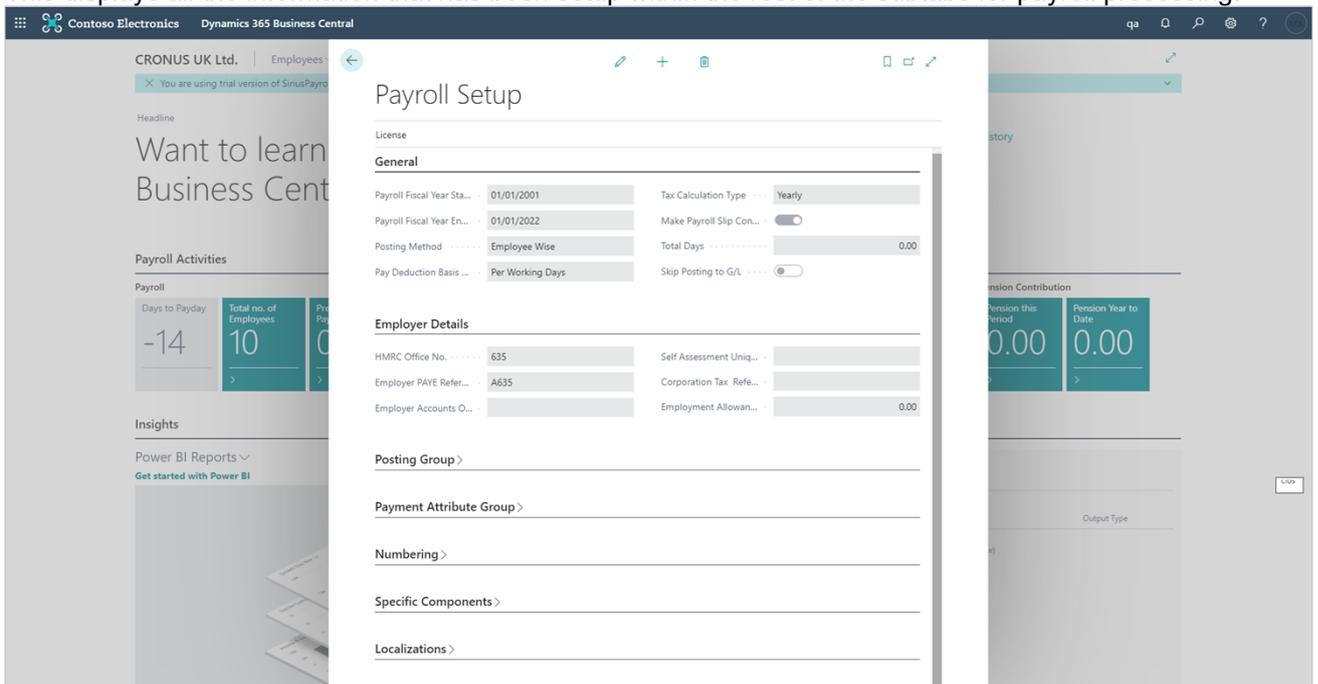
such as area code, fiscal year, etc. which would then determine the tax rate brackets. - Pay Frequency is to setup frequency of the pay, whether it would be weekly, monthly, etc. as per company policy.



So, finally, lets click on 'Payroll Setups' under payroll setup.

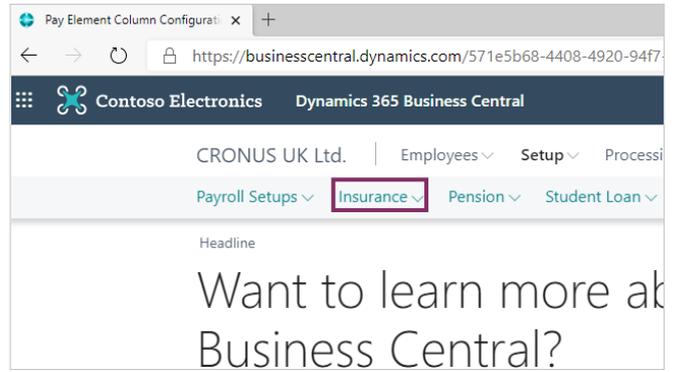


This displays all the information that has been setup within the rest of the subtabs for payroll processing.

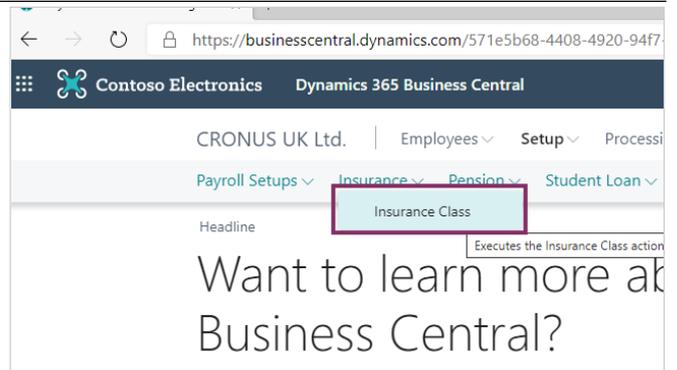


1.4.2.2. Insurance Setups

So now, click on 'Insurance.'

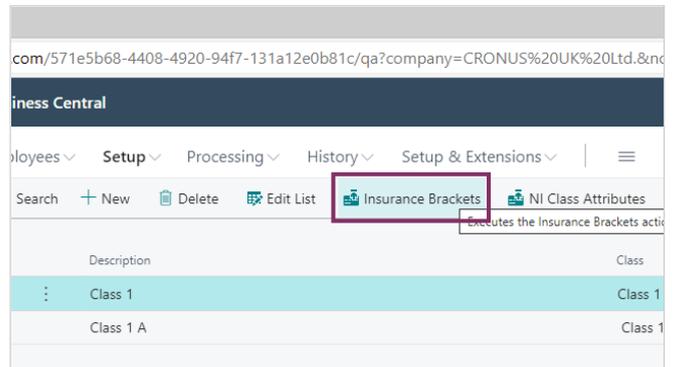


Click on its suntab: 'Insurance Class.'



This displays the different insurance classes defined by the government.

Now, lets click on 'Insurance Brackets.'



Here, you will see the insurance brackets for each employee, the fiscal year, insurance type and frequency.

A screenshot of the Dynamics 365 Business Central interface showing the 'Insurance Brackets' table. The table displays a list of insurance brackets for each employee, including the class code, contributor, fiscal year, type, pay frequency, start amount, and end amount. The table is filtered by 'CLASS 1'.

| Class Code 1 | Contributor 1 | Fiscal Year 1 | Type 1 | Pay Frequency 1 | Start Amount | End Amount |
|--------------|---------------|---------------|------------------|-----------------|--------------|----------------|
| CLASS 1 | Employer | 2020/2021 | First Limit Rate | Weekly | 120.00 | 169.00 |
| CLASS 1 | Employer | 2020/2021 | First Limit Rate | BiWeekly | 240.00 | 338.00 |
| CLASS 1 | Employer | 2020/2021 | First Limit Rate | Monthly | 520.00 | 732.00 |
| CLASS 1 | Employer | 2020/2021 | First Limit Rate | Annually | 6,240.00 | 8,788.00 |
| CLASS 1 | Employer | 2020/2021 | Second Limit ... | Weekly | 169.00 | 962.00 |
| CLASS 1 | Employer | 2020/2021 | Second Limit ... | BiWeekly | 338.00 | 1,924.00 |
| CLASS 1 | Employer | 2020/2021 | Second Limit ... | Monthly | 732.00 | 4,167.00 |
| CLASS 1 | Employer | 2020/2021 | Second Limit ... | Annually | 8,788.00 | 50,000.00 |
| CLASS 1 | Employer | 2020/2021 | Final Limit Rate | Weekly | 962.00 | 999,999,999.00 |
| CLASS 1 | Employer | 2020/2021 | Final Limit Rate | BiWeekly | 1,924.00 | 999,999,999.00 |
| CLASS 1 | Employer | 2020/2021 | Final Limit Rate | Monthly | 4,167.00 | 999,999,999.00 |
| CLASS 1 | Employer | 2020/2021 | Final Limit Rate | Annually | 50,000.00 | 999,999,999.00 |
| CLASS 1 | Employee | 2020/2021 | First Limit Rate | Weekly | 120.00 | 183.00 |
| CLASS 1 | Employee | 2020/2021 | First Limit Rate | BiWeekly | 240.00 | 366.00 |
| CLASS 1 | Employee | 2020/2021 | First Limit Rate | Monthly | 520.00 | 792.00 |
| CLASS 1 | Employee | 2020/2021 | First Limit Rate | Annually | 6,240.00 | 9,500.00 |
| CLASS 1 | Employee | 2020/2021 | Second Limit ... | Weekly | 183.00 | 962.00 |
| CLASS 1 | Employee | 2020/2021 | Second Limit ... | BiWeekly | 366.00 | 1,924.00 |
| CLASS 1 | Employee | 2020/2021 | Second Limit ... | Monthly | 792.00 | 4,167.00 |
| CLASS 1 | Employee | 2020/2021 | Second Limit ... | Annually | 9,500.00 | 50,000.00 |
| CLASS 1 | Employee | 2020/2021 | Final Limit Rate | Weekly | 962.00 | 999,999,999.00 |
| CLASS 1 | Employee | 2020/2021 | Final Limit Rate | BiWeekly | 1,924.00 | 999,999,999.00 |
| CLASS 1 | Employee | 2020/2021 | Final Limit Rate | Monthly | 4,167.00 | 999,999,999.00 |
| CLASS 1 | Employee | 2020/2021 | Final Limit Rate | Annually | 50,000.00 | 999,999,999.00 |

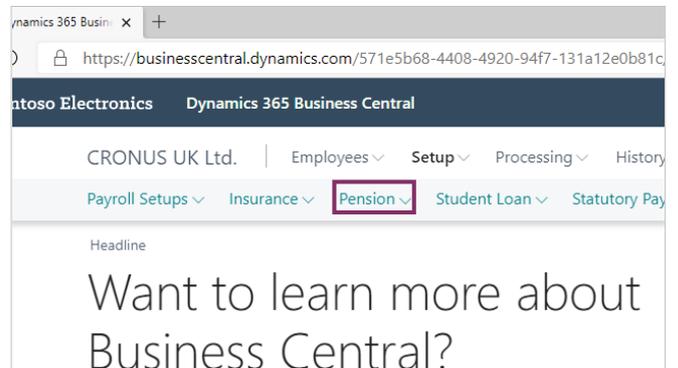
Similarly, NI Class Attributes show the NI class as per Insurance Class and Insurance categories show the categories as per class as well.

The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS UK Ltd.' with the 'Setup' menu open. The 'NI Class Attributes' table is displayed with the following data:

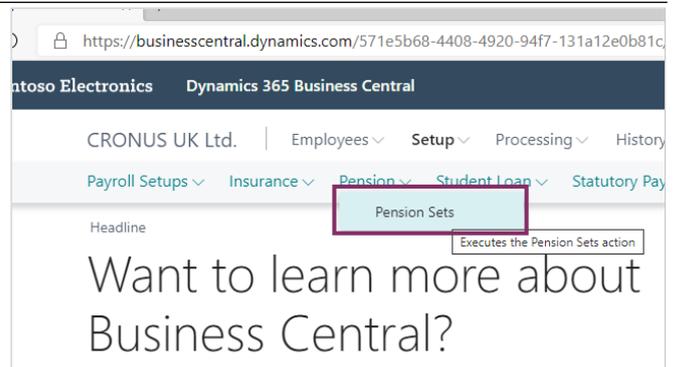
| Code 1 | Description | Class | Employee NI Attribute Code | Employer NI Attribute Code |
|----------|-------------|----------|----------------------------|----------------------------|
| CLASS 1 | Class 1 | Class 1 | NI- | NI+ |
| CLASS 1A | Class 1 A | Class 1A | | CLASS 1A NI+ |

1.4.2.3. Pension Setups

Now, lets click on 'Pension' for pension setups.

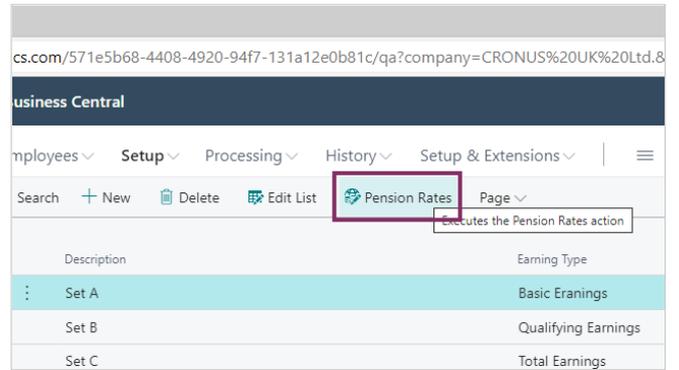


Then click on 'Pension Sets.'

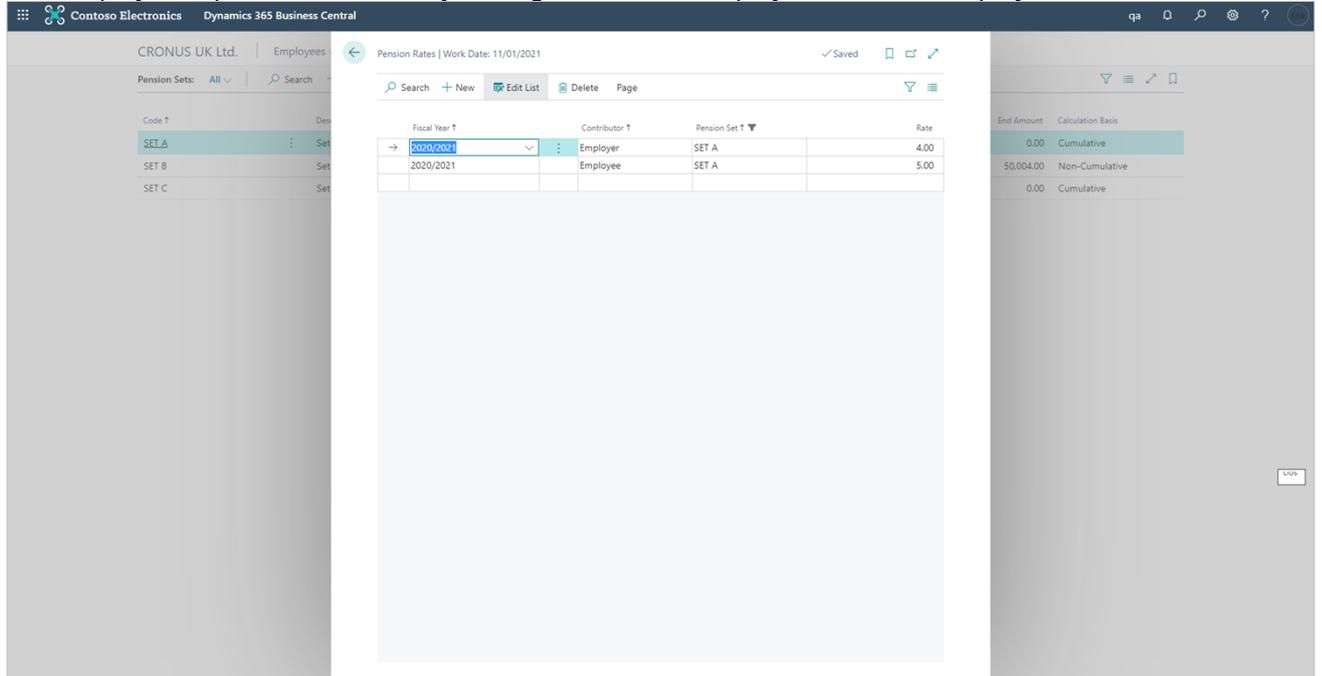


This displays the pension sets as per policy.

Click on 'Pension rates.'

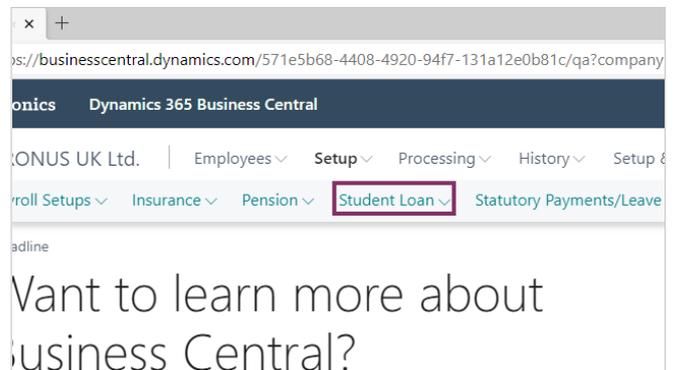


This displays the pension rates set by the organization for employer as well as employee.

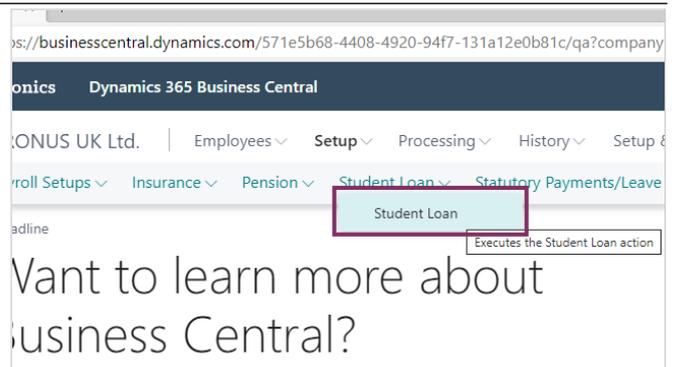


1.4.2.4. Student Loan Setups

Moving on, lets click on 'Student Loan' for student loan setups.



Click on the subtab 'student loan'



This displays the different types of student loans that could be provided, such as, postgraduate loan and other

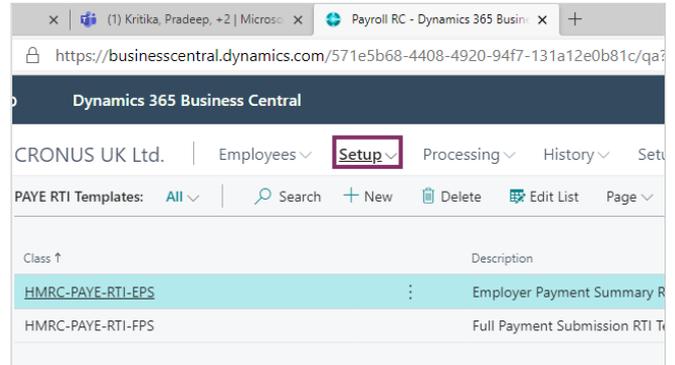
loans. The details on student loans can also be found within the 'Student Loan Details' tab.

1.4.2.5. Statutory Payments or Leaves

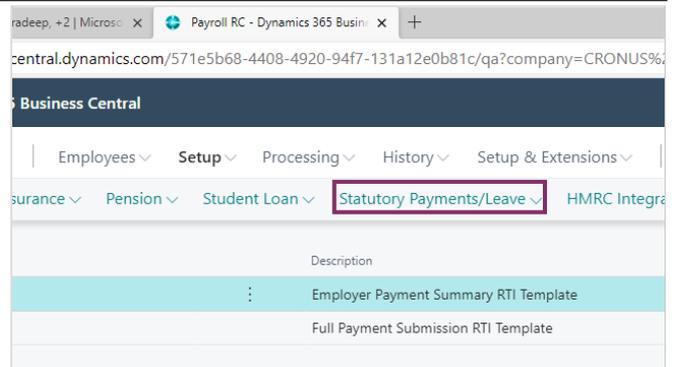
Now, we will be exploring the Statutory Payments and Leave Tab, under Setup.

Here, you can define Statutory payments, leaves and policies. Let's see how we can define policies under this section.

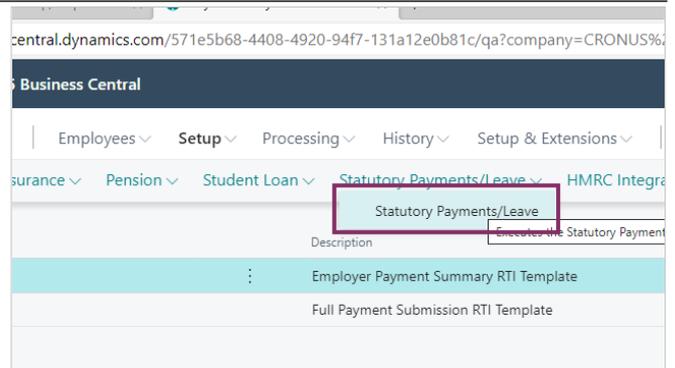
Navigate to the top-panel and select Setup



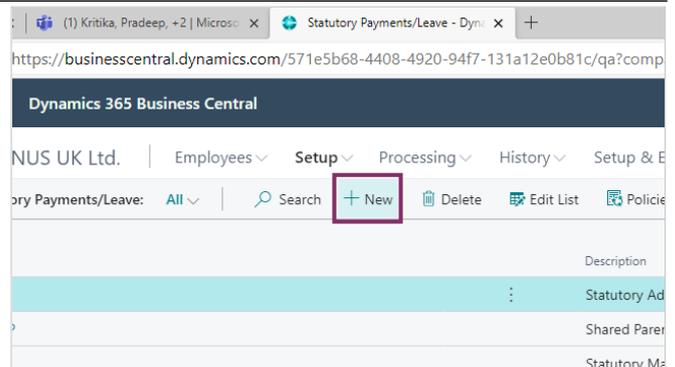
Select Statutory Payments/Leave



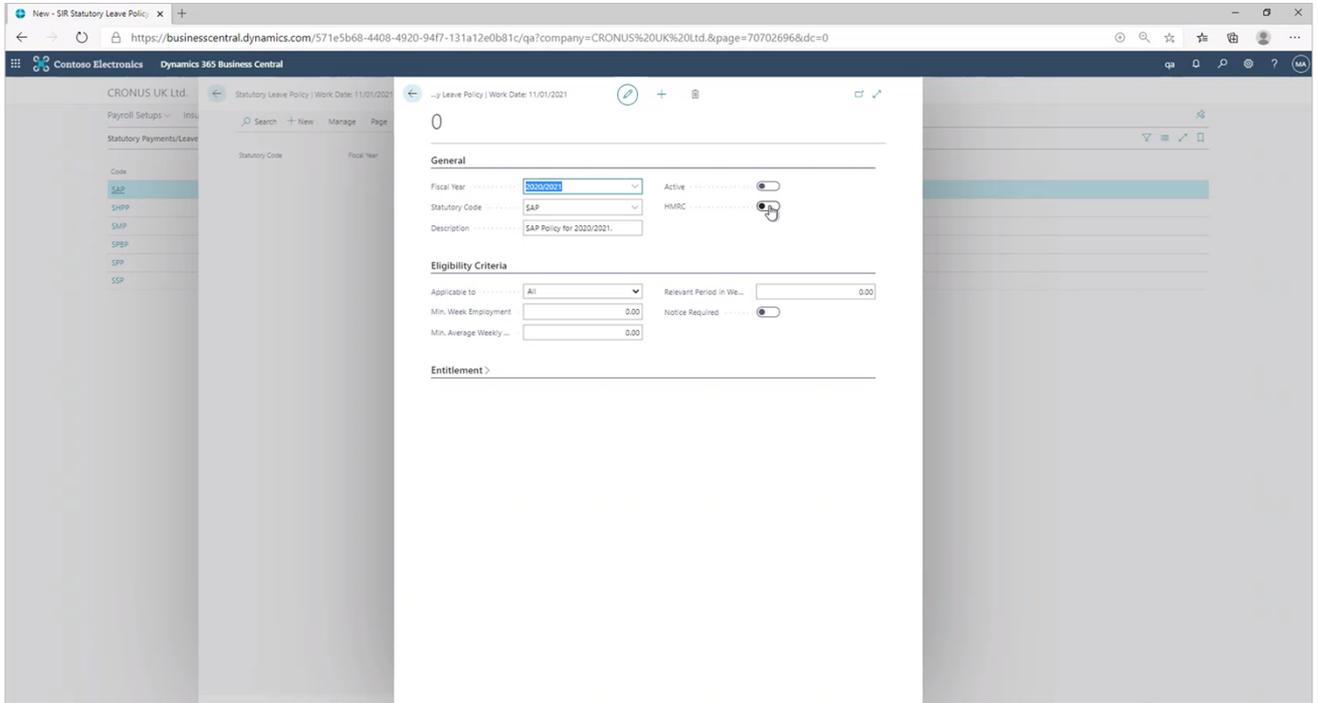
Select the option Statutory Payments/Leave



Click on New.



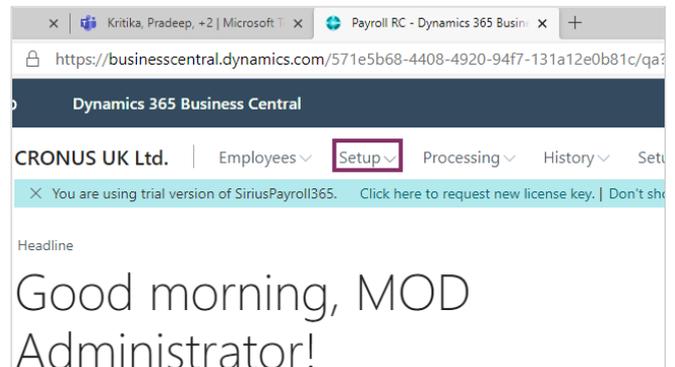
Now, as we can see on the screen, these details can be entered. While setting up a new policy, you can mark it as Active, as applicable. You can also mark it as HMRC depending on whether it is applicable to your organization. All the fields under the Statutory payments tab are configurable.



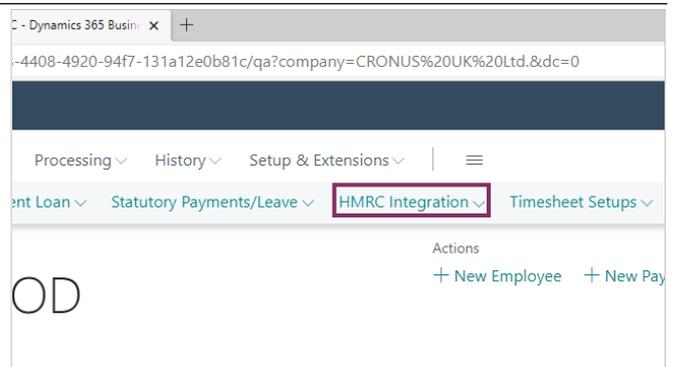
1.4.2.6. HMRC Integration

The first thing we need to ensure before using the HMRC Integration, is to link the Common Data Service to our SiriusPayroll 365. Once we link the CDS, we can proceed to select the PAYE RTI Templates.

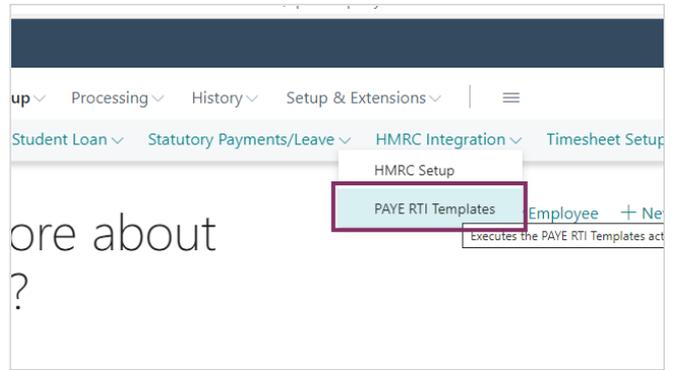
Click on Setup.



Click on HMRC Integration.

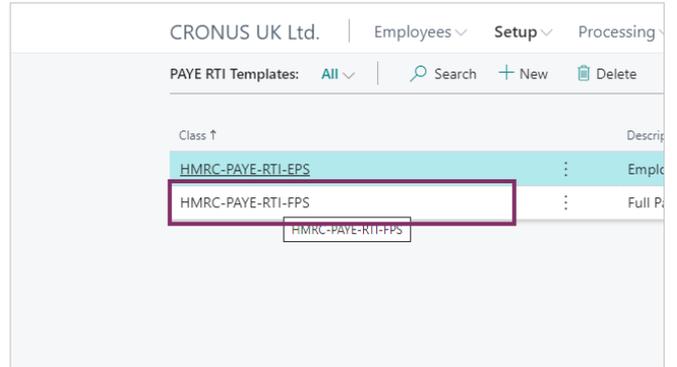


Select PAYE RTI Templates

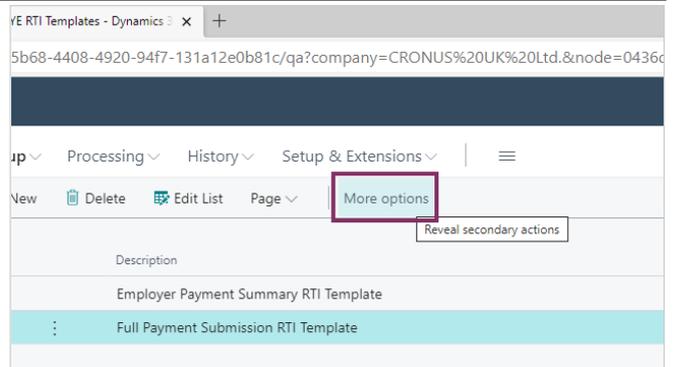


PAYE RTI Templates are the templates we use in order to submit the application to HMRC. Let us take an example of Full Payment Submission to illustrate this.

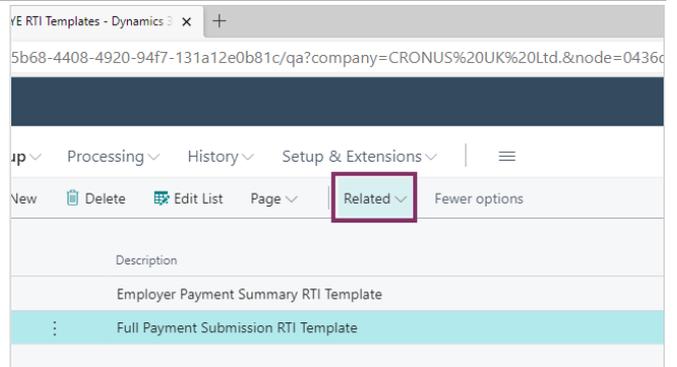
Click on 'Class name.'



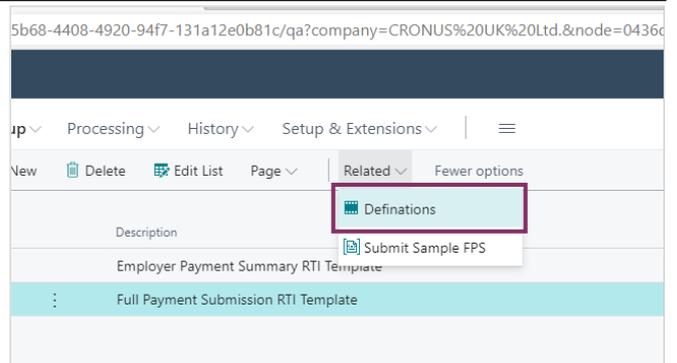
Click on 'More Options.'



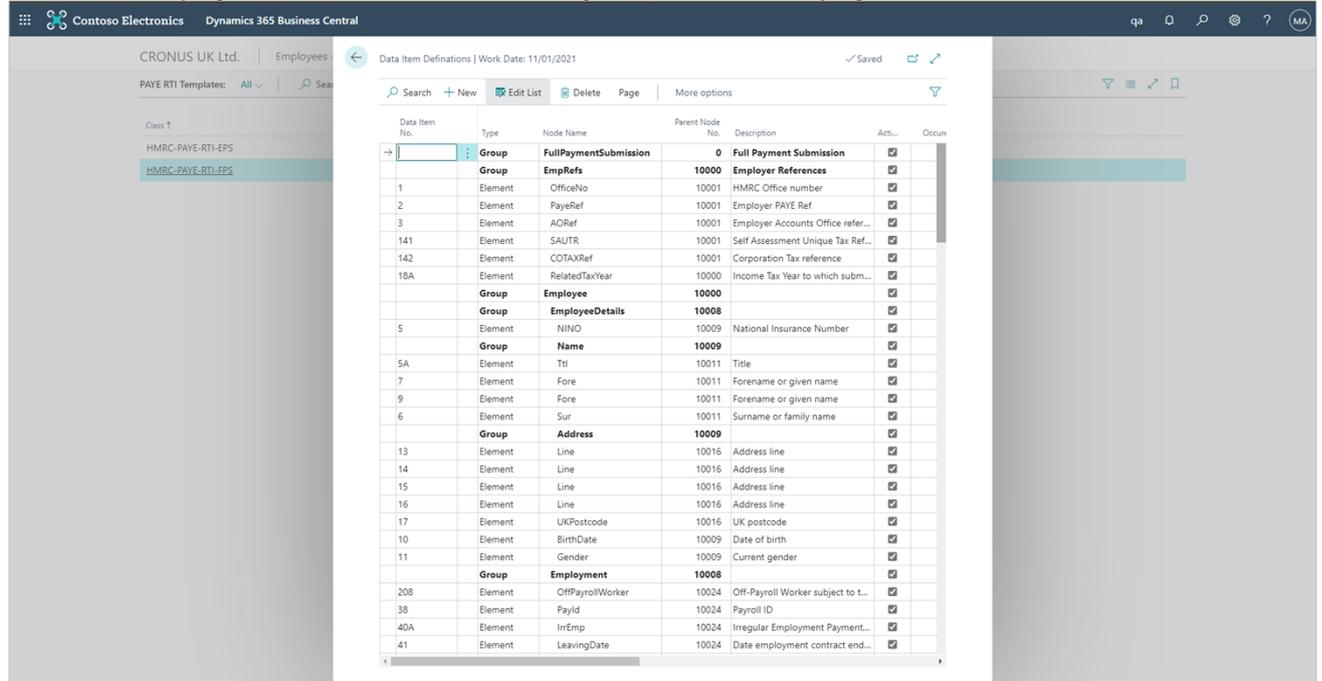
Then, click on Related.



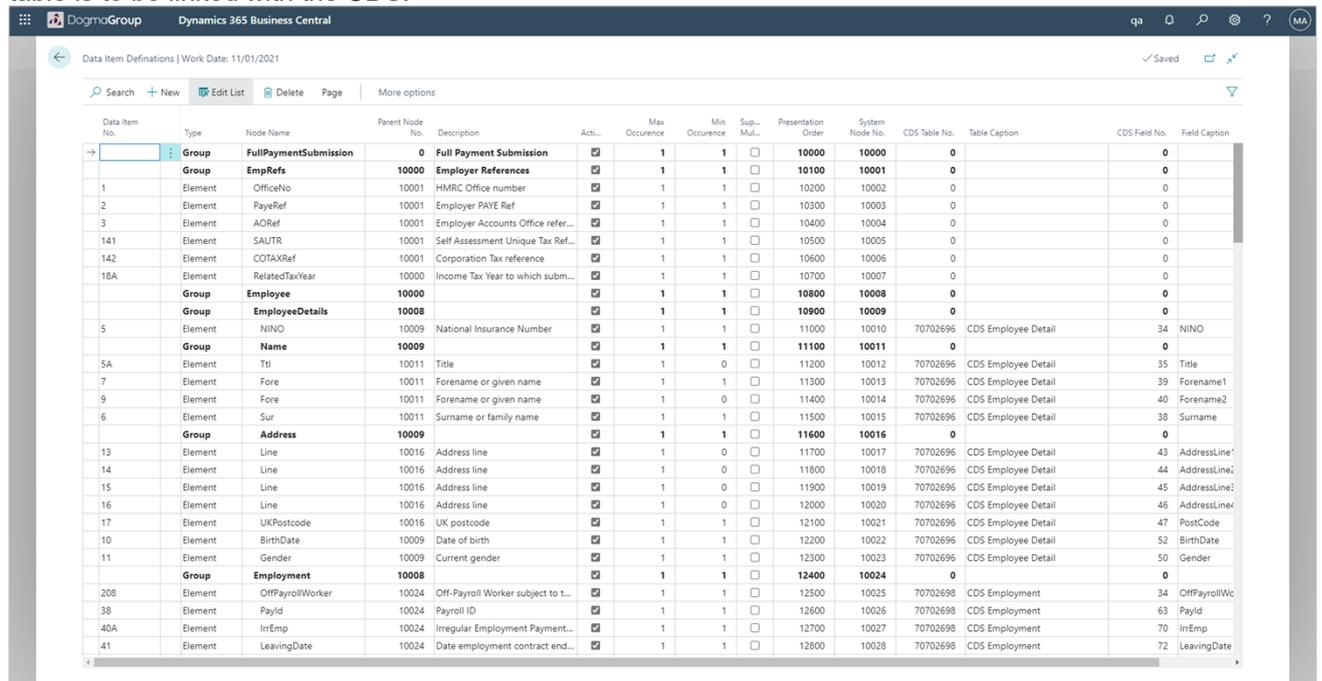
Select Definations.



On doing this, you will be able to view the Data number that is defined by the HMRC. All of these data numbers are unique. Each data item number is assigned to a value. For instance, 1 defines the Office number, 2 defines the Pay reference, and so on. One thing to note here, is that the values can be indented. Here, you will notice that Employee References are indented by one, whereas, Employee Details have an indentation of two.

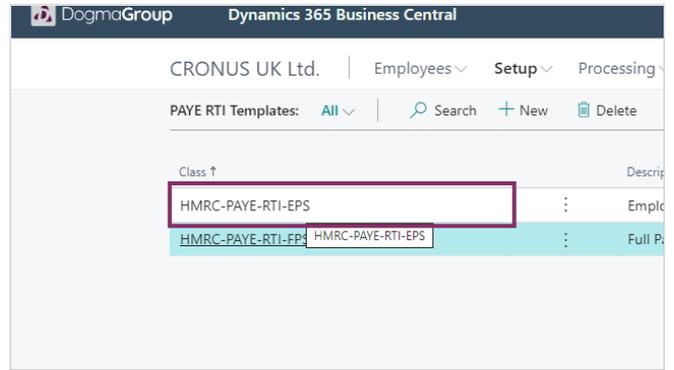


The HMRC Template that we just explored is modifiable. This means that, we can change the values in these fields as required, in case of any changes done by the government on HMRC templates. As mentioned earlier in the chapter, the HMRC Integration is linked with the Common Data Service. So, this HMRC template communicates with the Common Data Service, therefore, through the CDS Table no., we can define which table is to be linked with the CDS.

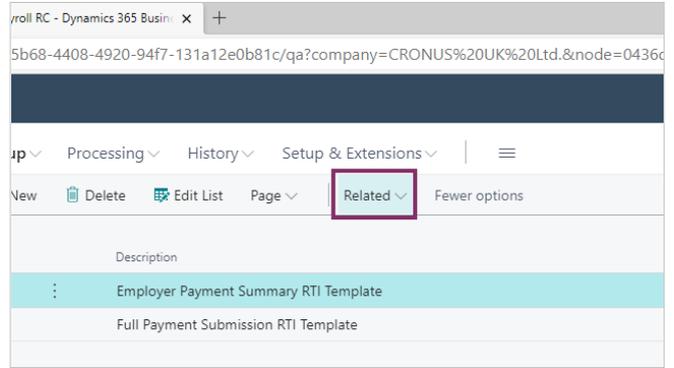


Under HMRC integration, each column can be configured as per the organization need. Next, let's explore the template for EPS.

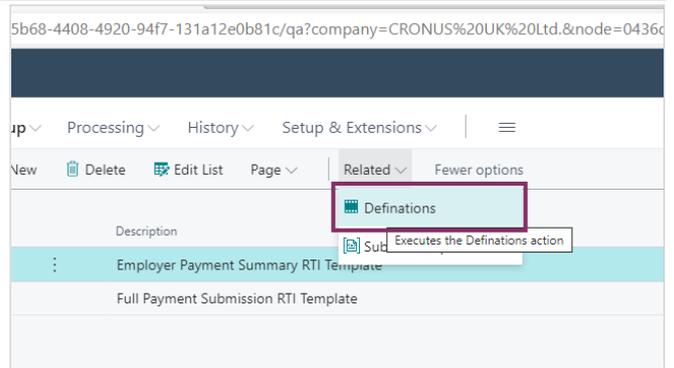
Click on the 'Class name.'



Click on Related



Select Definitions



After doing that, you will be able to see this template.

The screenshot shows the 'Data Item Definitions' table in Dynamics 365 Business Central. The table lists various data items with columns for Data Item No., Type, Node Name, Parent Node No., Description, and System Node No. The table is filtered to show only the 'Employer Payment Summary' data items.

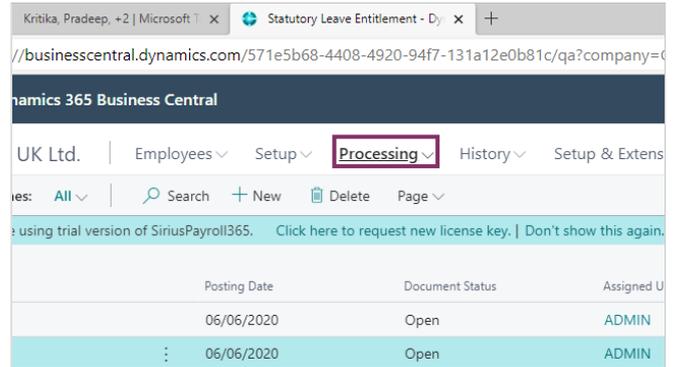
| Data Item No. | Type | Node Name | Parent Node No. | Description | Act... | Max Occurrence | Min Occurrence | Sup. Mul. | Presentation Order | System Node No. | CDS Table No. | Table Caption | CDS Field No. | Field Caption |
|---------------|-----------|-----------------------|-----------------|-------------------------------------|-------------------------------------|----------------|----------------|--------------------------|--------------------|-----------------|---------------|---------------|---------------|---------------|
| | Group | EmployerPaymentSum... | 0 | Employer Payment Summary | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 10000 | 10000 | 0 | | 0 | |
| | Group | EmpRefs | 10000 | Employer References | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 10100 | 10001 | 0 | | 0 | |
| 1 | Element | OfficeNo | 10001 | HMRC Office number | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 10200 | 10002 | 0 | | 0 | |
| 2 | Element | PayeRef | 10001 | Employer PAYE Ref | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 10300 | 10003 | 0 | | 0 | |
| 3 | Element | AORef | 10001 | Employer Accounts Office refer... | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 10400 | 10004 | 0 | | 0 | |
| 166 | Element | EmpAllceInd | 10000 | Employment Allowance Indicator | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 10500 | 10005 | 0 | | 0 | |
| | Group | DeMinimisStateAid | 10000 | | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 10600 | 10006 | 0 | | 0 | |
| 199 | Element | Agri | 10006 | Employer is in the agriculture s... | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 10700 | 10007 | 0 | | 0 | |
| 204 | Element | Aid | 10006 | Amount of De minimis State ai... | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 10800 | 10008 | 0 | | 0 | |
| 205 | Attribute | Cur | 10008 | Currency of amount of De mini... | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 10900 | 10009 | 0 | | 0 | |
| | Group | RecoverableAmounts... | 10000 | | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 11000 | 10010 | 0 | | 0 | |
| 93 | Element | SPPRecovered | 10010 | Value of SPP recovered year to ... | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 11100 | 10011 | 0 | | 0 | |
| 95 | Element | ShPPRecovered | 10010 | Value of ShPP recovered year t... | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 11200 | 10012 | 0 | | 0 | |
| 206 | Element | SPBPRecovered | 10010 | Value of Statutory Parental Ber... | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 11300 | 10013 | 0 | | 0 | |
| 98 | Element | NICCompensationOnS... | 10010 | Value of NIC compensation on ... | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 11400 | 10014 | 0 | | 0 | |
| 100 | Element | NICCompensationOnS... | 10010 | Value of NIC compensation on ... | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 11500 | 10015 | 0 | | 0 | |
| 207 | Element | NICCompensationOnS... | 10010 | Value of NIC compensation on ... | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 11600 | 10016 | 0 | | 0 | |
| | Group | ApprenticeshipLevy | 10000 | | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 11700 | 10017 | 0 | | 0 | |
| 187 | Element | LevyDueYTD | 10017 | Apprenticeship Levy due year t... | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 11800 | 10018 | 0 | | 0 | |
| 188 | Element | TaxMonth | 10017 | Tax month | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 11900 | 10019 | 0 | | 0 | |
| 189 | Element | AnnualAlice | 10017 | Annual Apprenticeship Levy all... | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 12000 | 10020 | 0 | | 0 | |
| | Group | Account | 10000 | | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 12100 | 10021 | 0 | | 0 | |
| 156 | Element | AccountHoldersName | 10021 | Name of account holder | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 12200 | 10022 | 0 | | 0 | |
| 157 | Element | AccountNo | 10021 | Account number | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 12300 | 10023 | 0 | | 0 | |
| 158 | Element | SortCode | 10021 | Branch Sort Code | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 12400 | 10024 | 0 | | 0 | |
| 159 | Element | BuildingSocRef | 10021 | Building Society Reference | <input checked="" type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 12500 | 10025 | 0 | | 0 | |
| 18A | Element | RelatedTaxYear | 10000 | Income Tax year to which subm... | <input type="checkbox"/> | 0 | 0 | <input type="checkbox"/> | 12600 | 10026 | 0 | | 0 | |

1.4.3. Processing

Now the third tab on this Navigation panel is 'Processing.' Lets explore the elements present under this ' tab.

This is the main area where you will be generating the Payroll. Let's go ahead and see how we can do that. Under this tab, we can add Statutory Leave Entitlements as well as explore payroll batches. Let's go ahead and explore them.

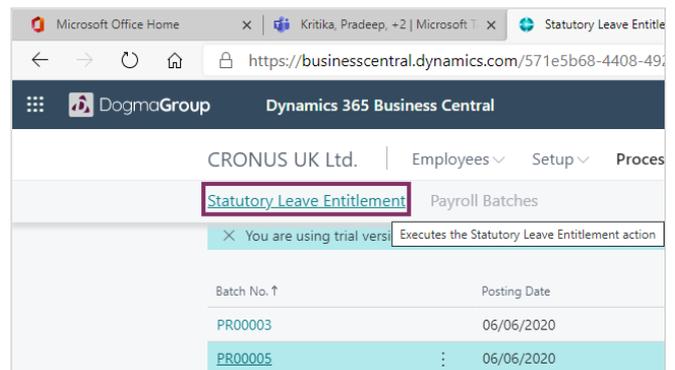
From the top-panel, select Processing.



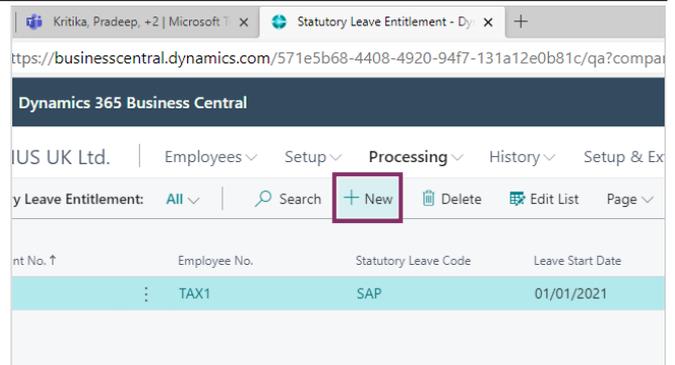
We can see the two subtabs.

1.4.3.1. Statutory Leave Entitlement

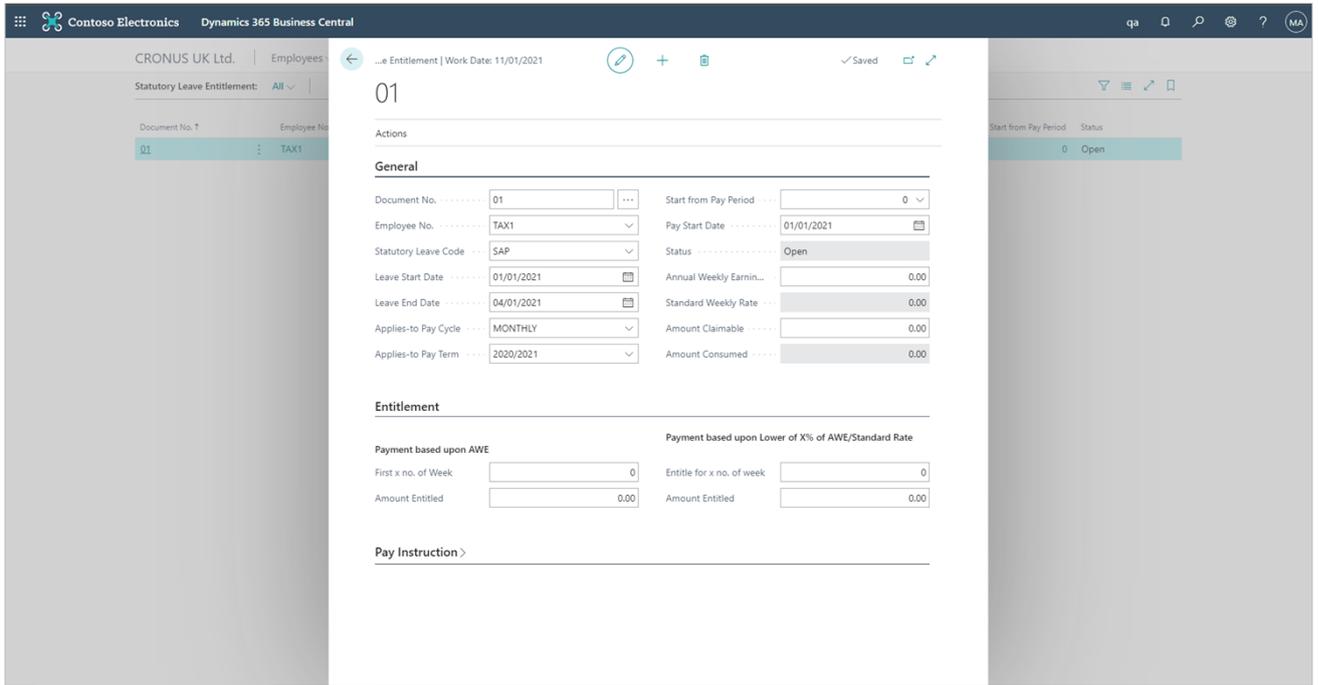
Click on Statutory Leave Entitlement.



Click on 'New.'



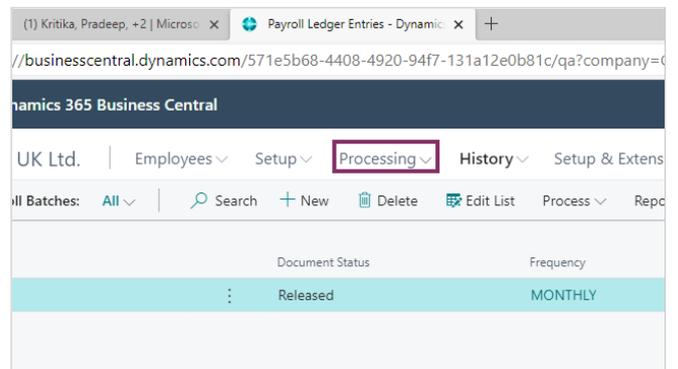
We can then, enter the details as shown on the screen. Notice that some fields are marked with a red asterisk. This implies that these fields are mandatory.



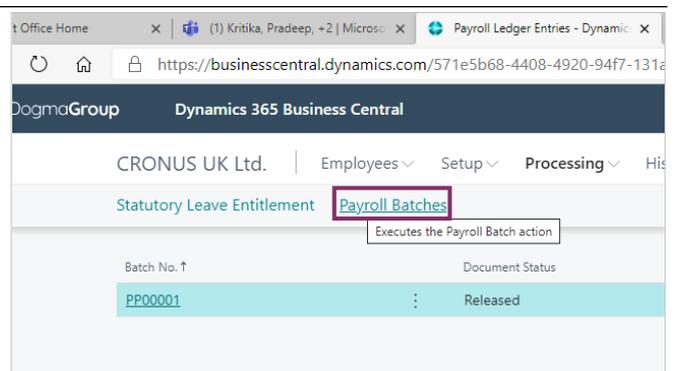
1.4.3.2. Payroll Batch

Now lets explore the next subtab under 'Processing,' which is 'Payroll Batch.'

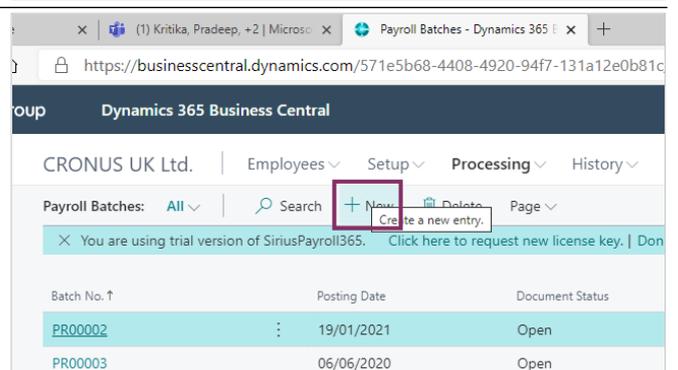
From the top-panel, click on Processing.



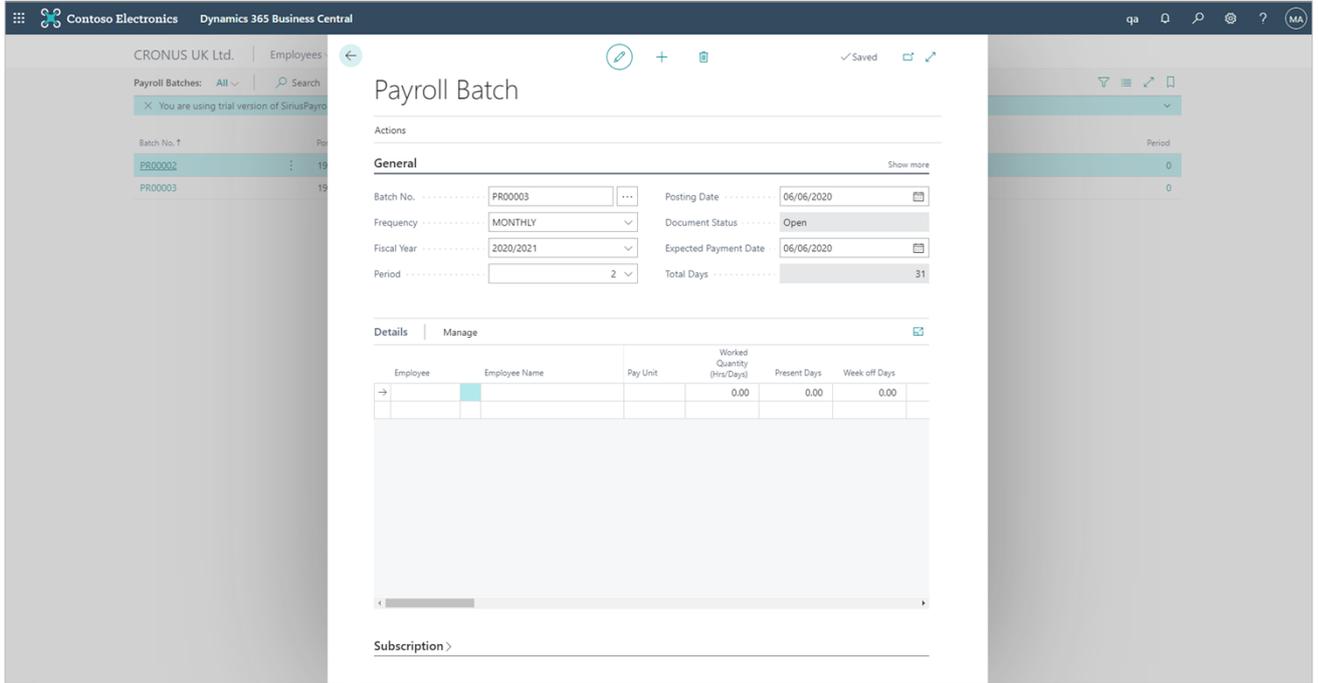
Select Payroll Batches.



Click on 'New'.

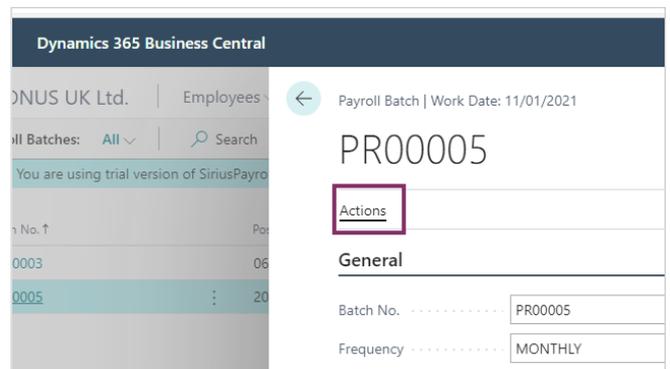


You will notice that fields like Batch no. and Posting Date are auto-generated. You can fill in details as shown on the screen.

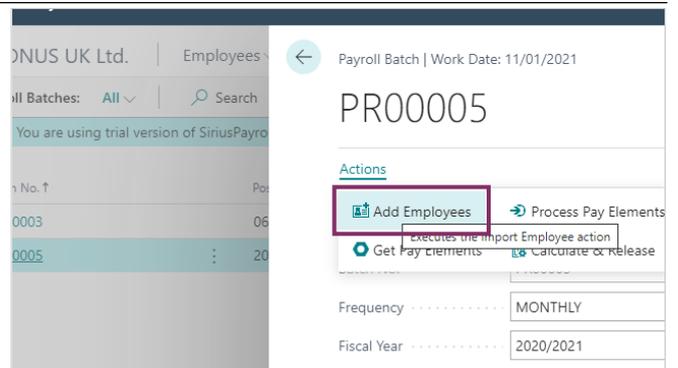


Next, let's add employees for whom we will be generating payrolls.

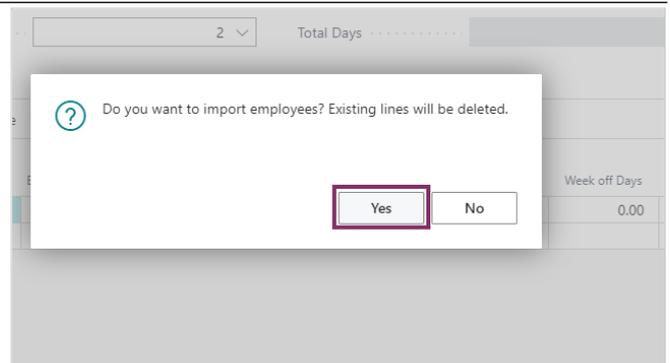
Click on Actions.



Select the Add Employees option.

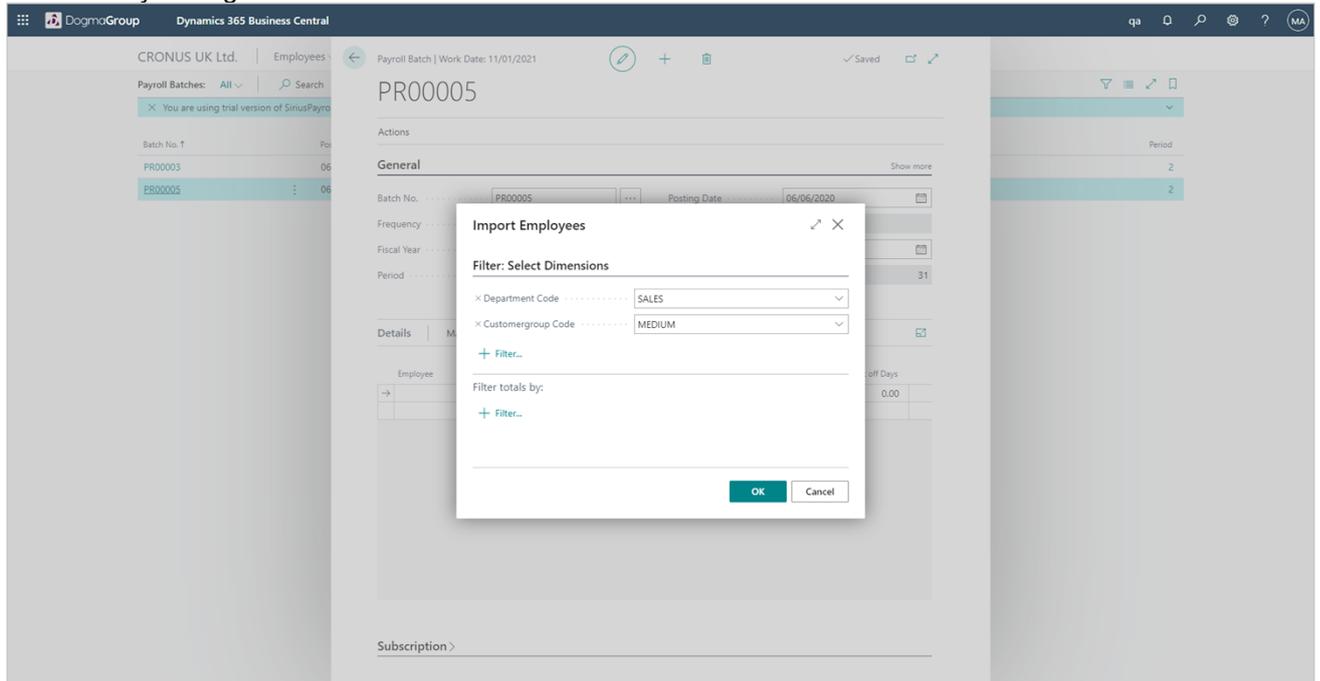


Click on Yes.



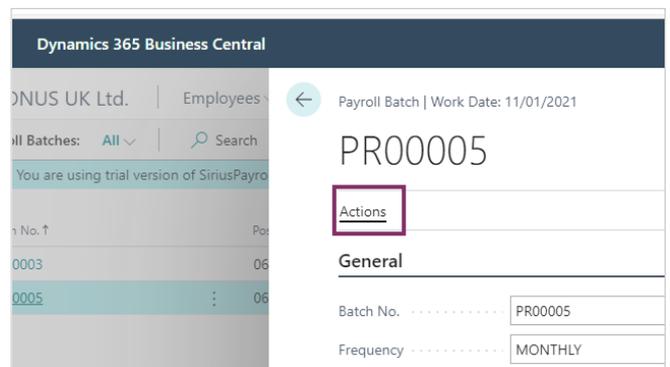
A dialogue box opens. You can enter the Department Code, Customer group code, or any other filters that are

relevant to your organization.

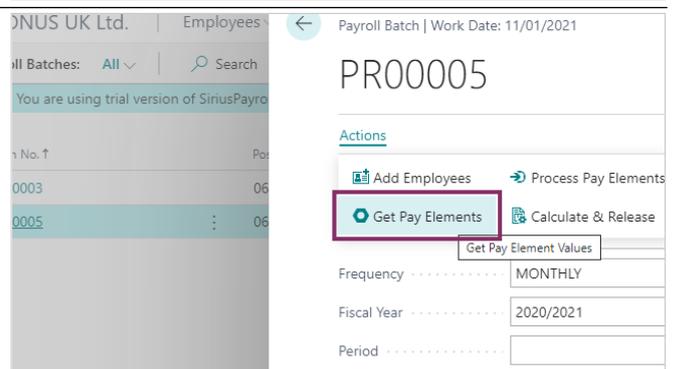


Now that we have imported the employees, let's generate their basic salary details. To do this, navigate to the top panel of the page.

Click on Actions.

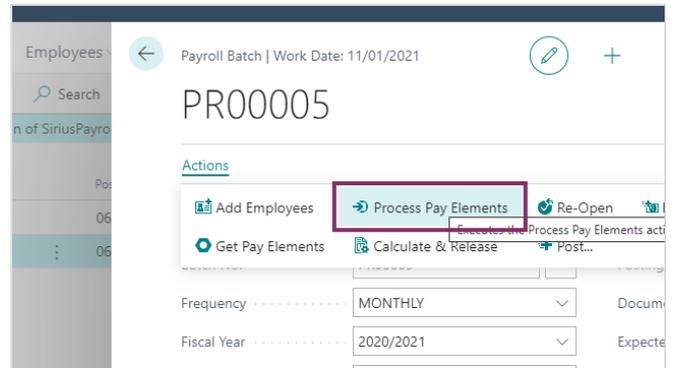


Select Get Pay Elements.



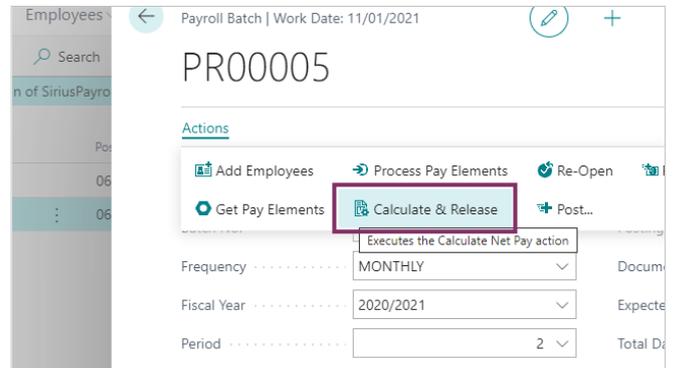
Now, we will generate details of whether National Insurance Employee Contribution and Pension Employee Contribution are applicable to the employees we have imported in the previous step.

To do this, click on Process 'Pay Elements' under Actions.

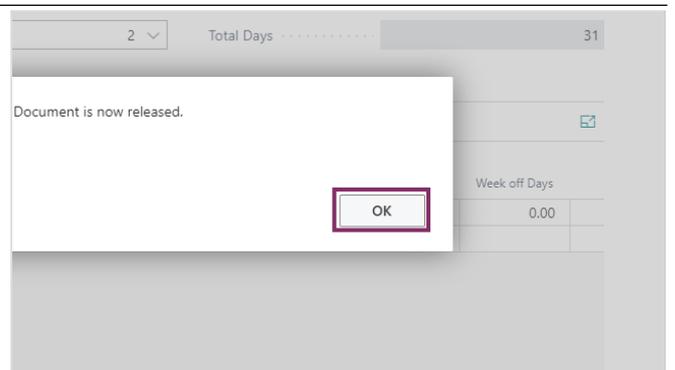


The final step, is to generate the final Payroll document.

Click on Calculate and Release.

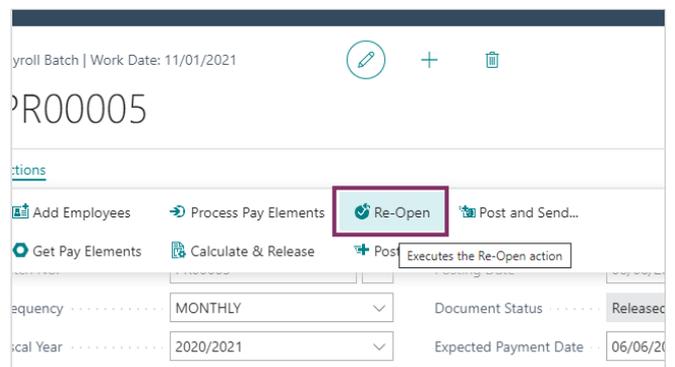


Select OK.



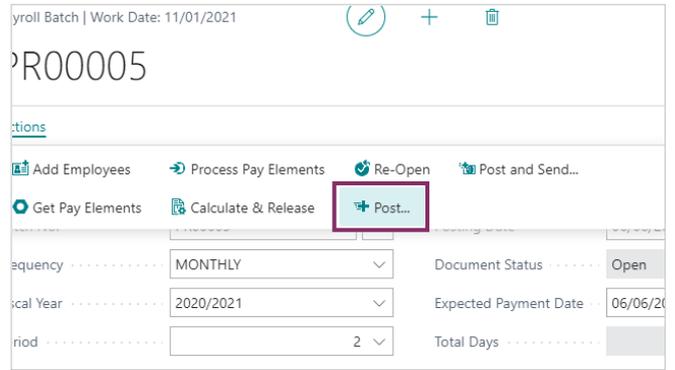
Any changes to be made to a released Payroll Batch, would require you to re-open the batch. To re-open, navigate to the top-panel of the screen.

Under Actions, click on Re-Open .

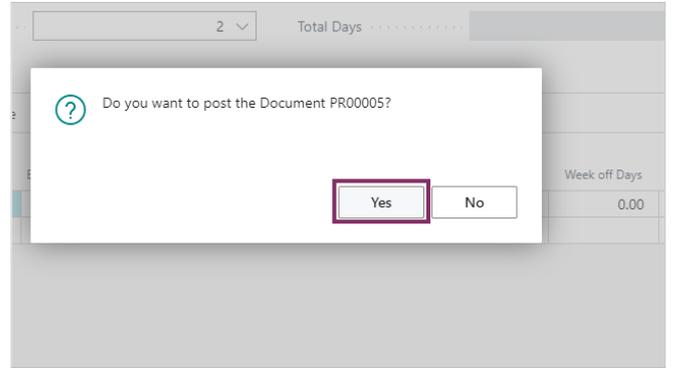


Moving ahead, let us now learn how to generate the ledgers and post the payroll.

Click on Post.



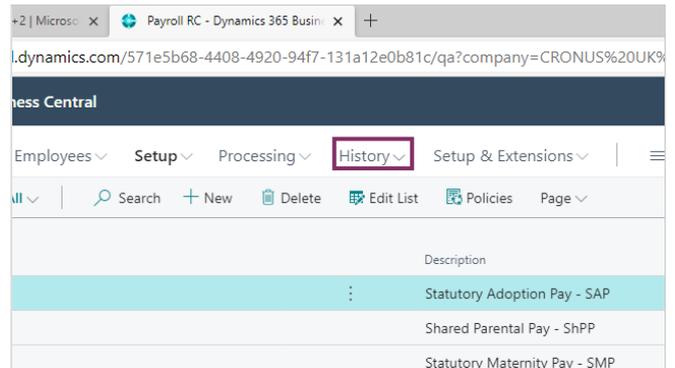
Select Yes.



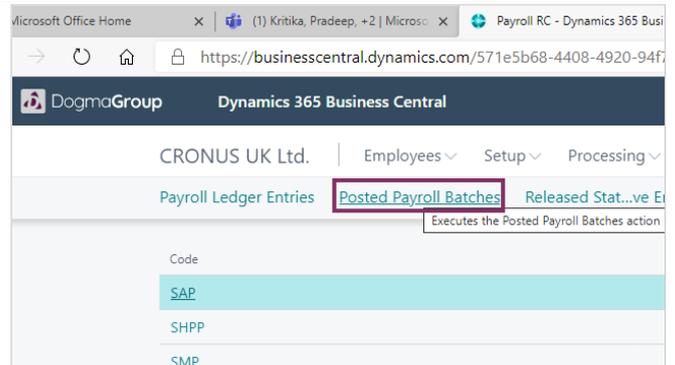
1.4.4. History

In the previous section, we saw how to generate ledgers and post payroll batches. Now, Let us view the ledgers that we generated. This can be done from the 'History' tab present on the navigation of our SiriusPayroll 365. Let's see how we can do that.

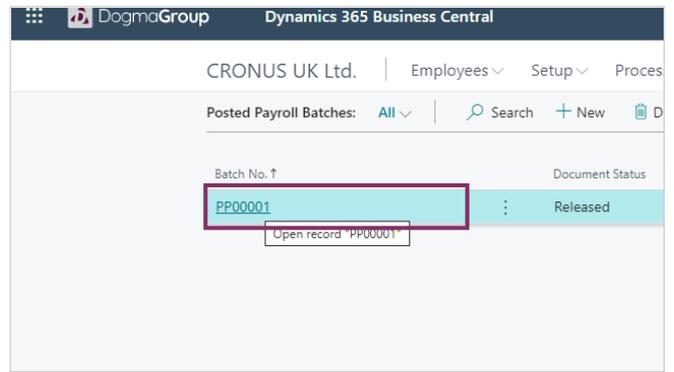
Click on History from the top-panel.



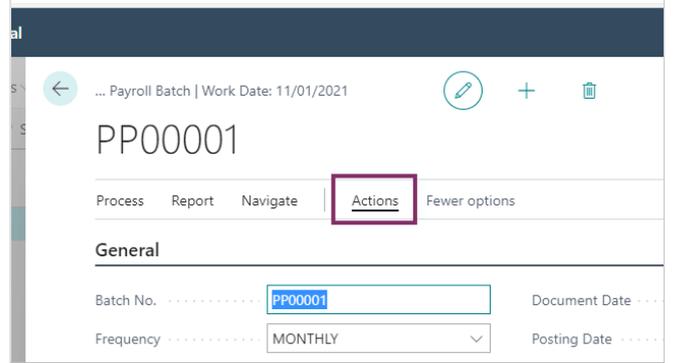
Select Posted Payroll Batches



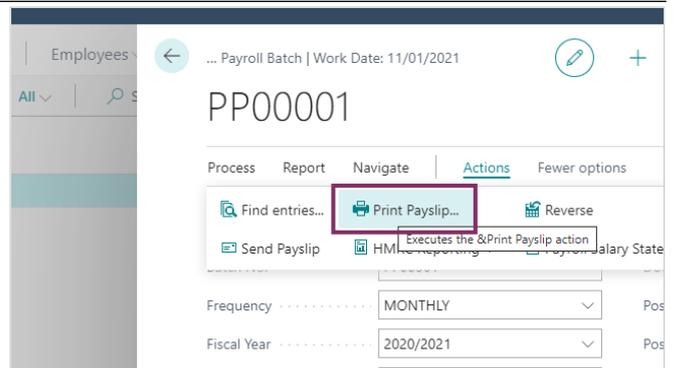
Select the Payroll Batch generated in the previous section.



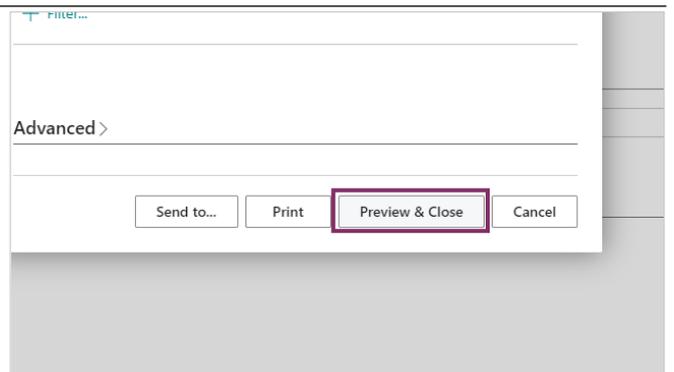
Click on Actions.



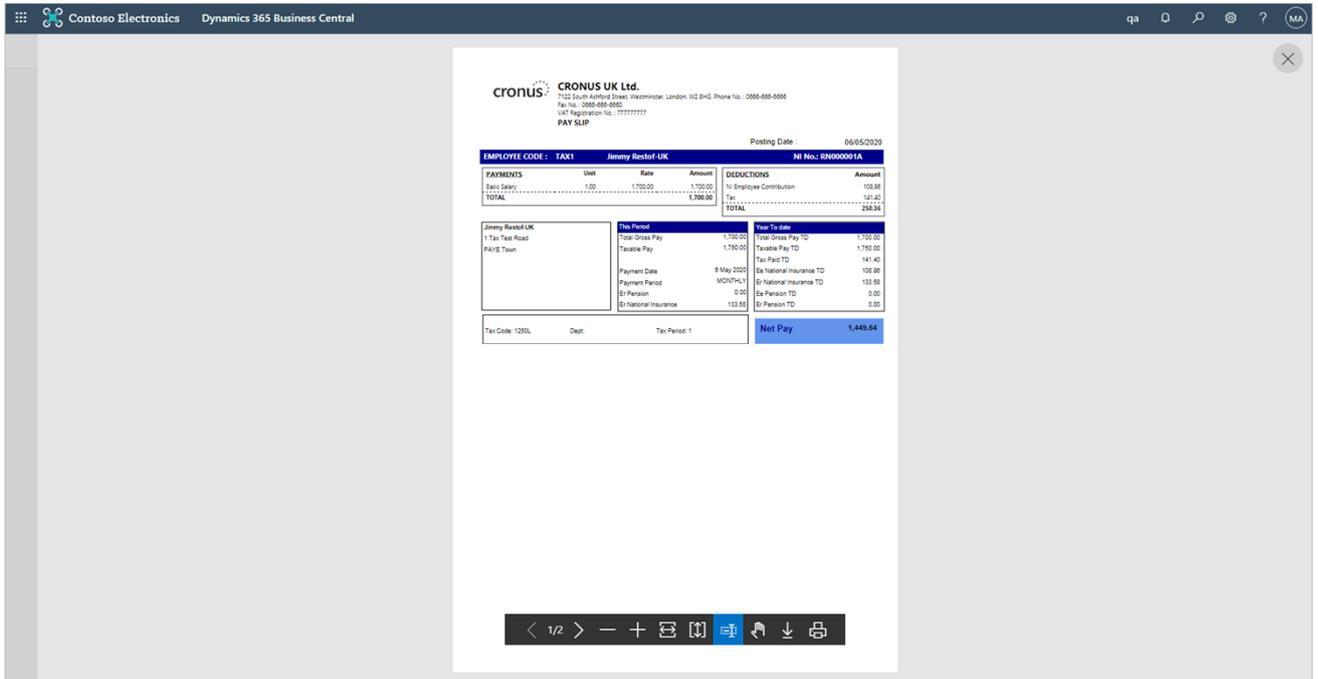
Select Print Payslip.



Now, click on Preview & Close.

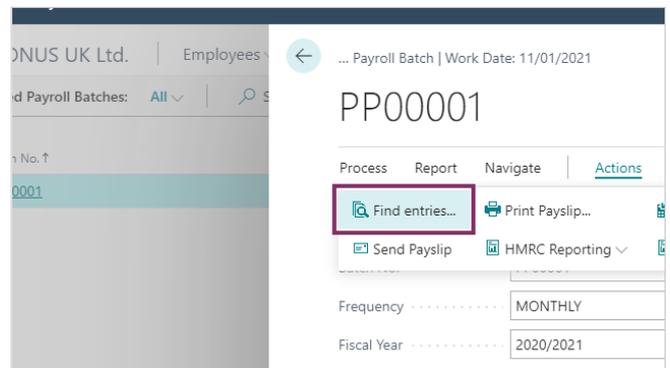


On doing this, you can see the generated Payroll.

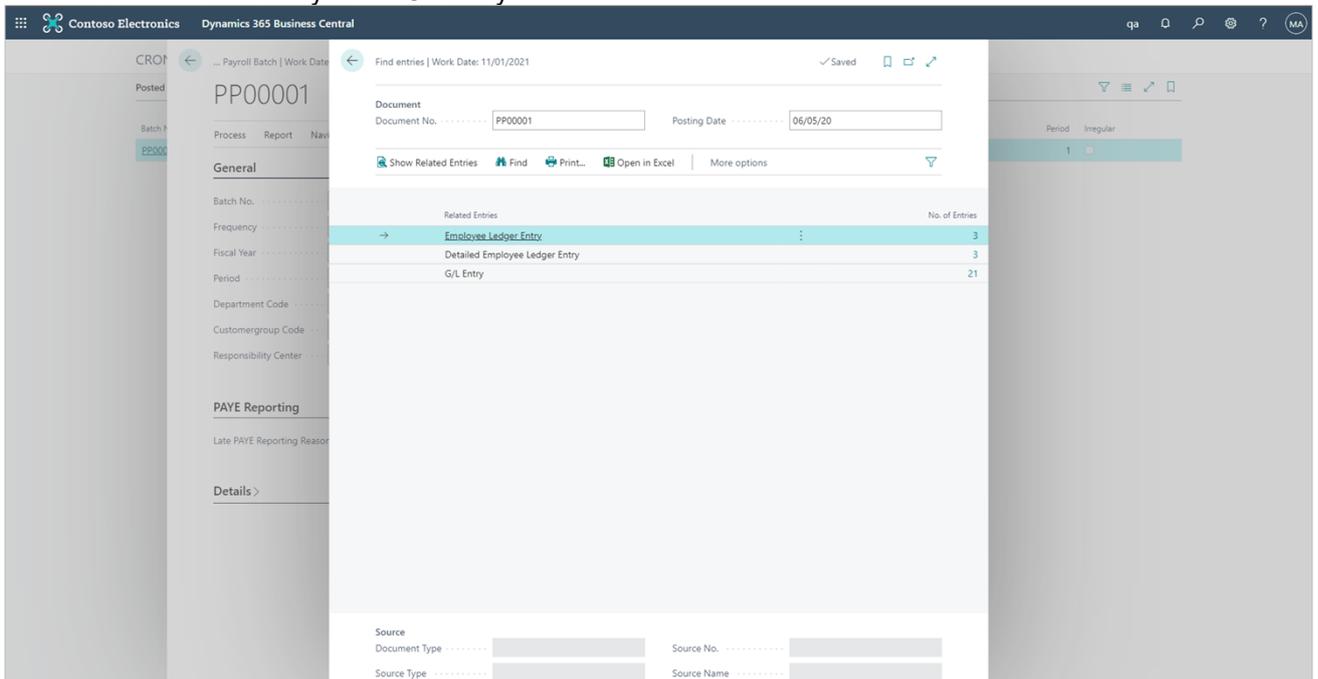


Next, let's go ahead and view what other entries have been created inside the application while generating the Payroll batch.

Under Actions, select Find Entries.

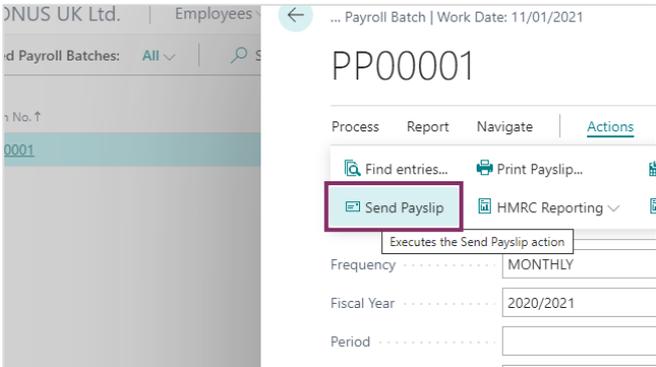


Here, you will be able to see the number of entries created. The first entry is for the employee ledger entry, which has the Business Central out of the box tables. The second entry created is the Employee detail Ledger entries. And the final entry is the GL Entry.



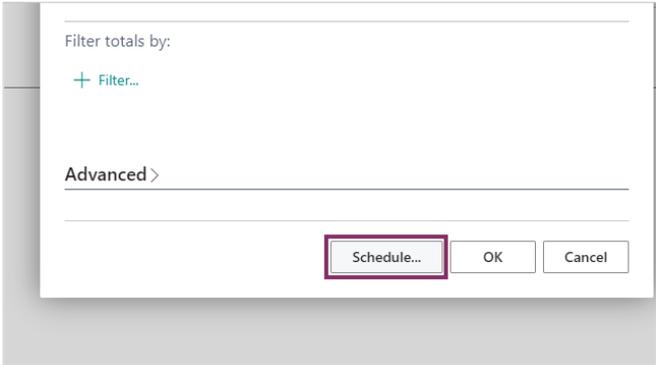
Another functionality under the Actions tab, is the 'Send Payslip' option.

Click on the navigation menu item **Send Payslip**

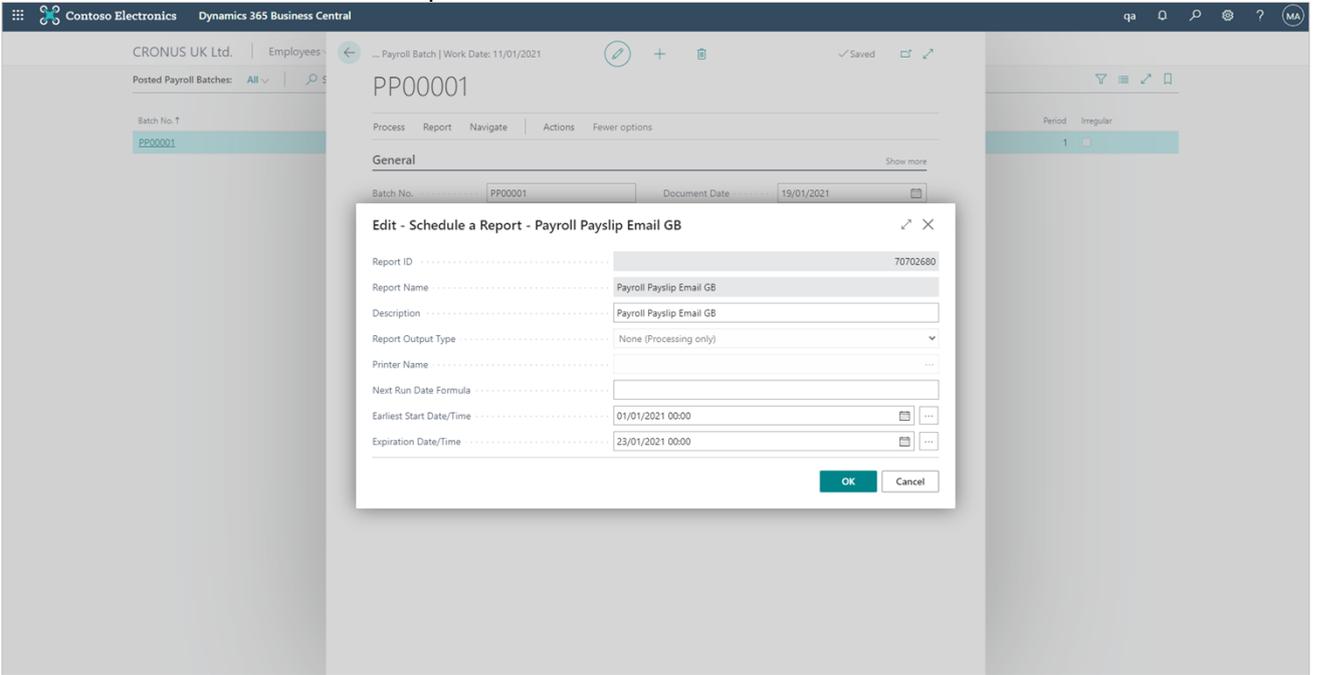


By selecting the 'Send Payslip', you can individually send a Payslip of a particular duration to an employee.

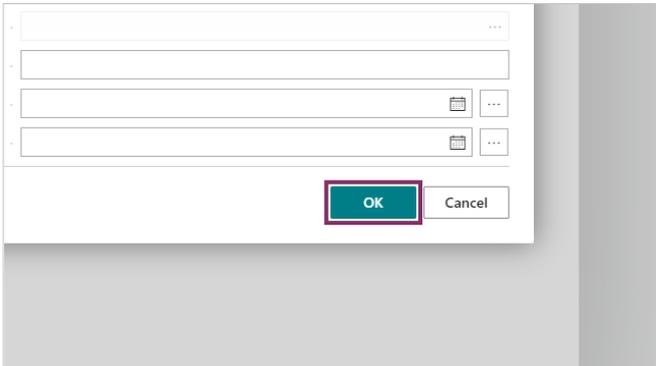
To do this, Click on 'Schedule'.



You can enter the Start date and Expiration Date as shown on the screen.

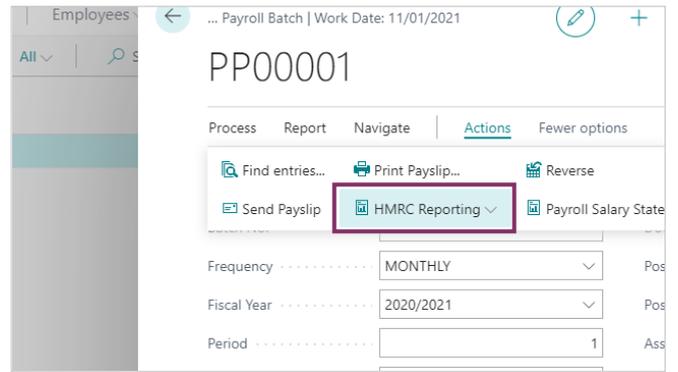


Click on OK to send.

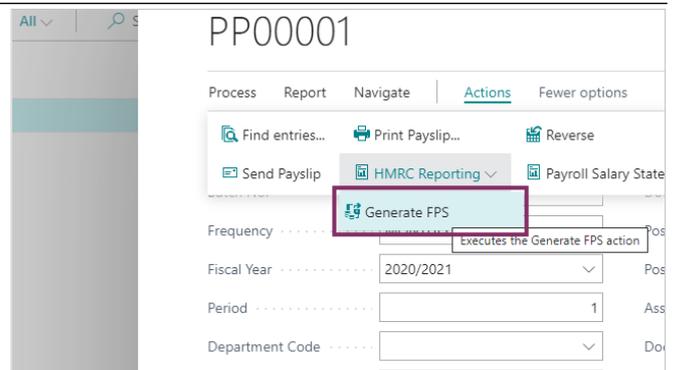


The Posted payroll batches has additional functionalities, like HMRC Reporting. Through HMRC Reporting, you can generate the FPS.

Click on HMRC Reporting.



Select the Generate FPS option.

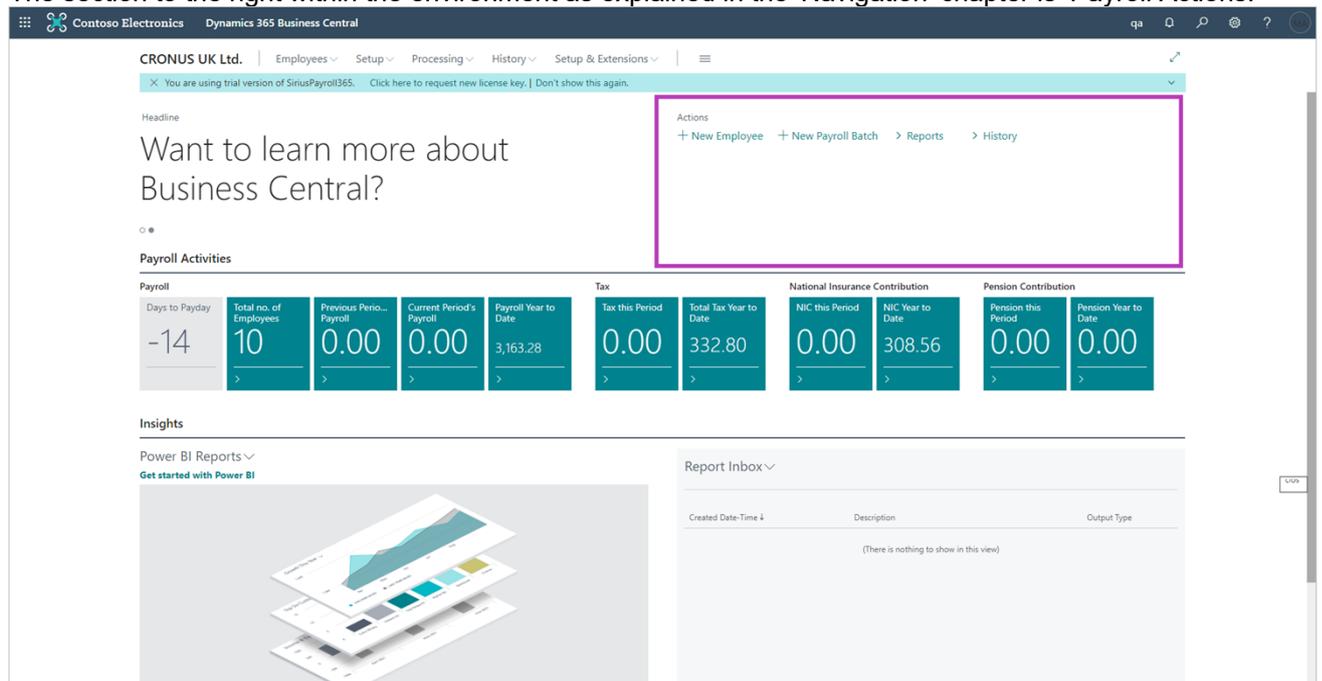


On doing this, registers will be created for each of the employees we imported in the previous chapters. The data entries for Registers will then be sent to the Common Data Service and will be synchronized there.

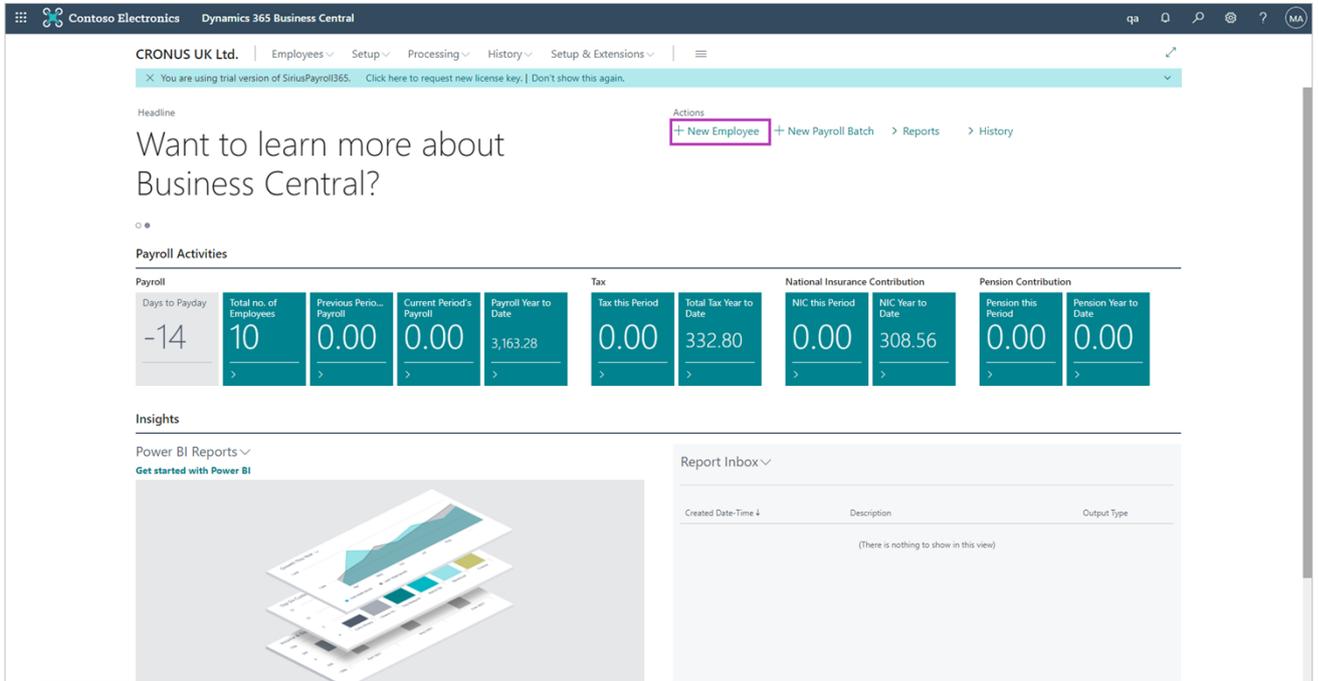
1.5. Payroll Actions and Activities

1.5.1. Payroll Actions

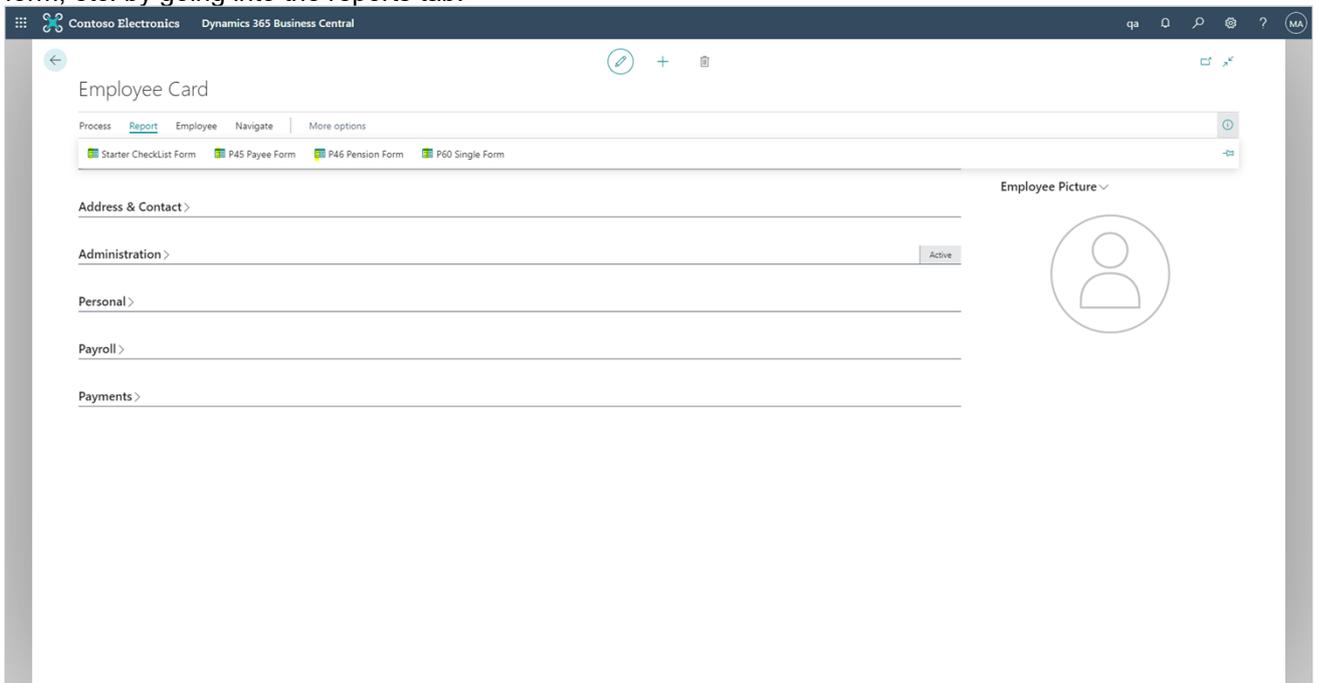
The section to the right within the environment as explained in the 'Navigation' chapter is 'Payroll Actions.'



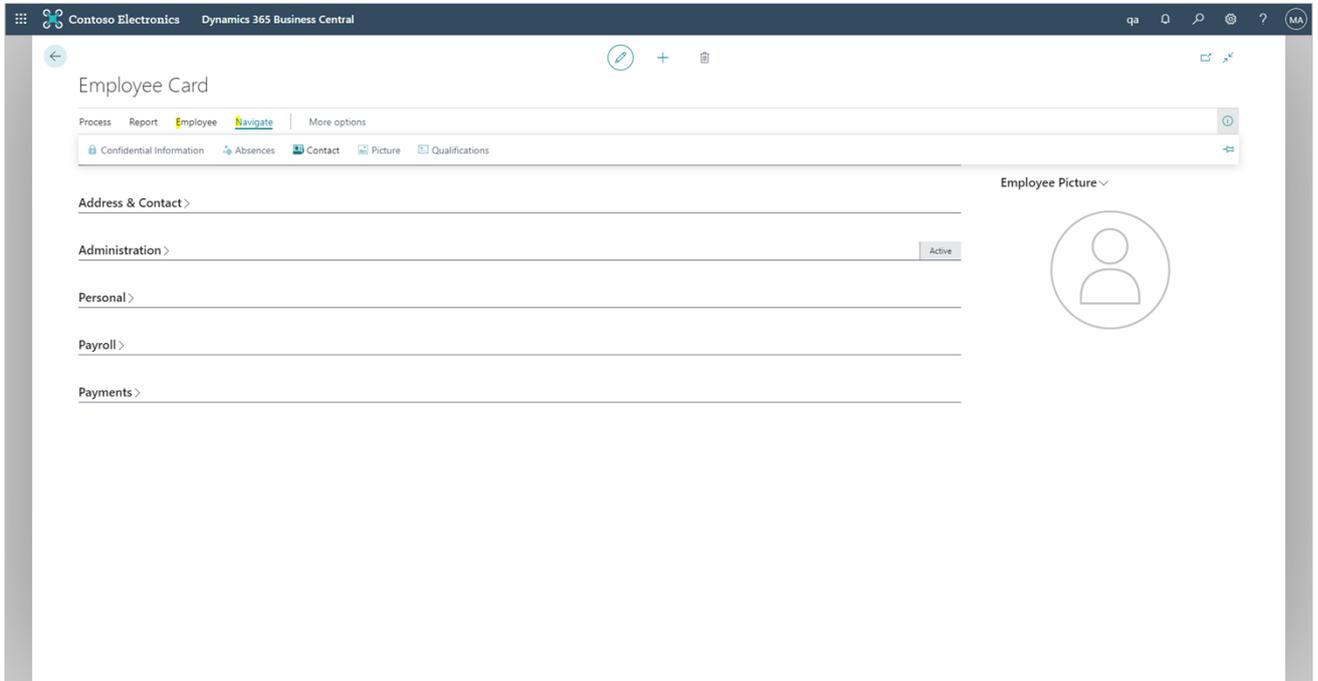
The very first action within Payroll Actions is 'New Employee.'



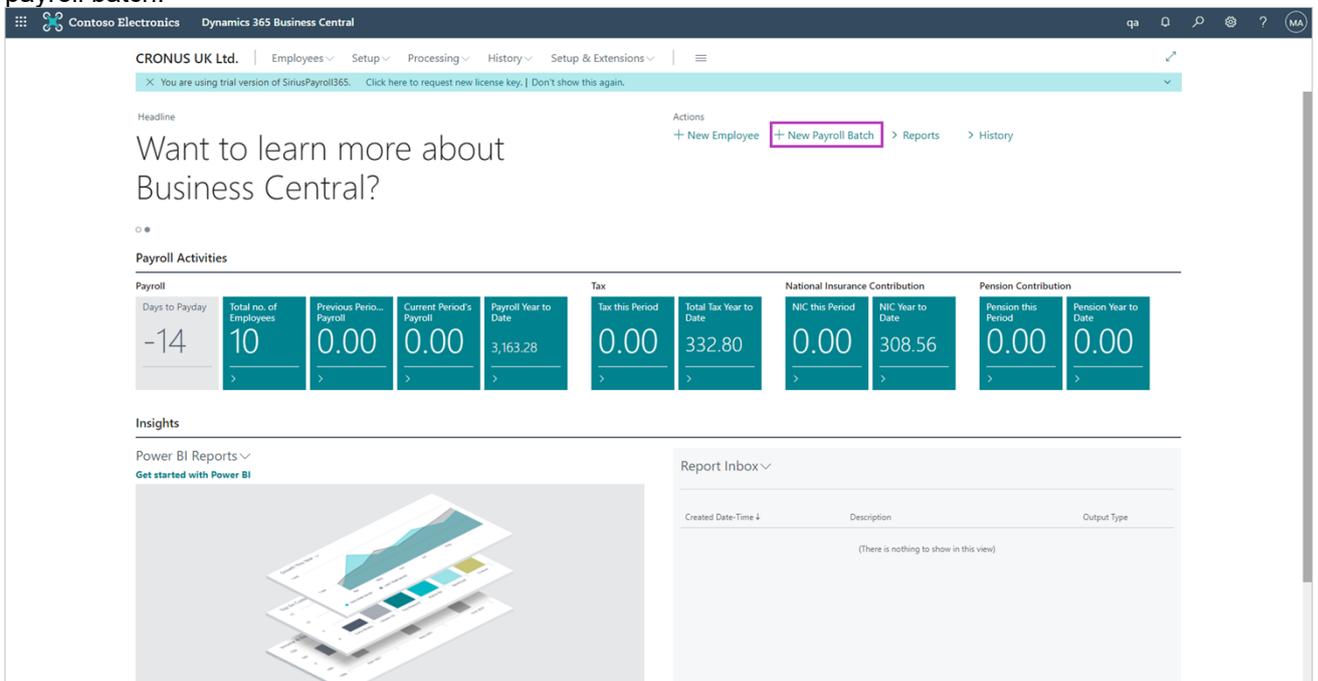
This is where you can open the employee card directly and set up the new employee's details for the payroll processing. Within the employee card, you can also fill in different forms such as starter checklist form, P45 form, etc. by going into the reports tab.



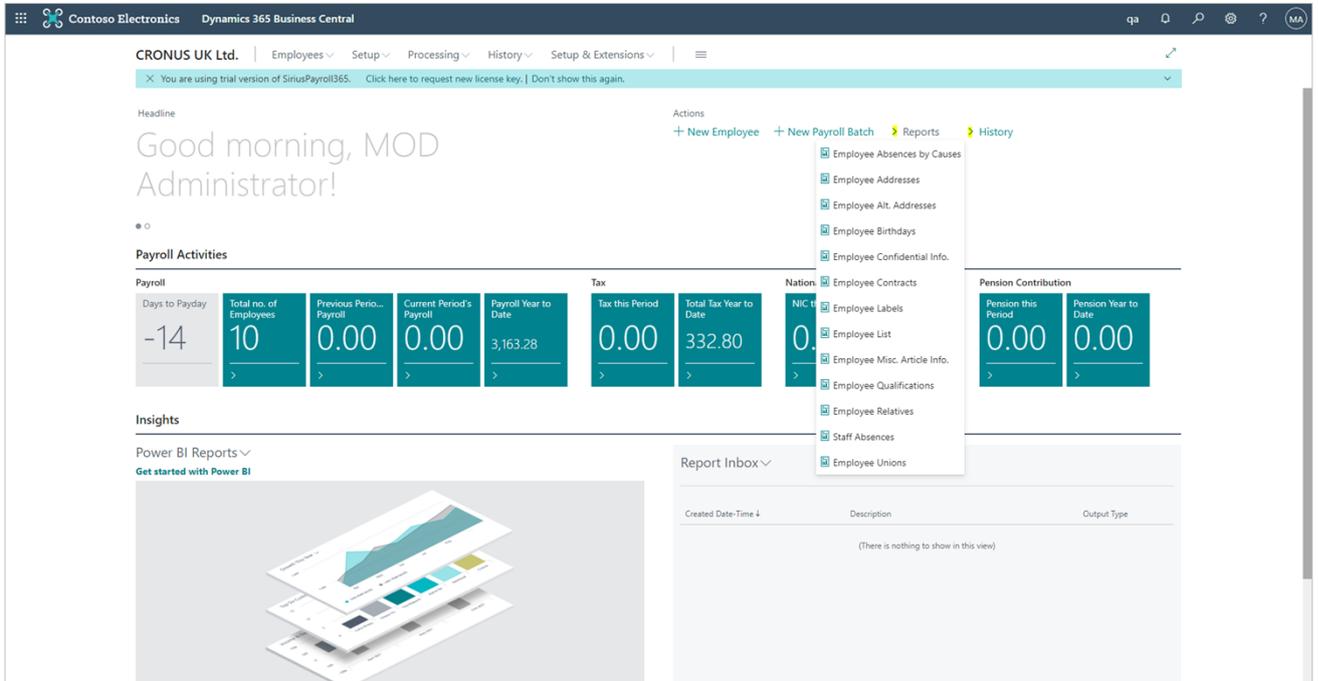
The other tabs within the employee card are Employee and Navigate. These simply help you to add in further employee information or attachment as well as navigate and fill their Confidential information, Absences, Contact, Picture and Qualifications.



Next Action within Payroll Action, is 'New Payroll Batch.' A payroll batch is a way to mark the records you want to pay. Anytime you wish to pay your workers for the hours they have worked, you will first need to create a payroll batch.



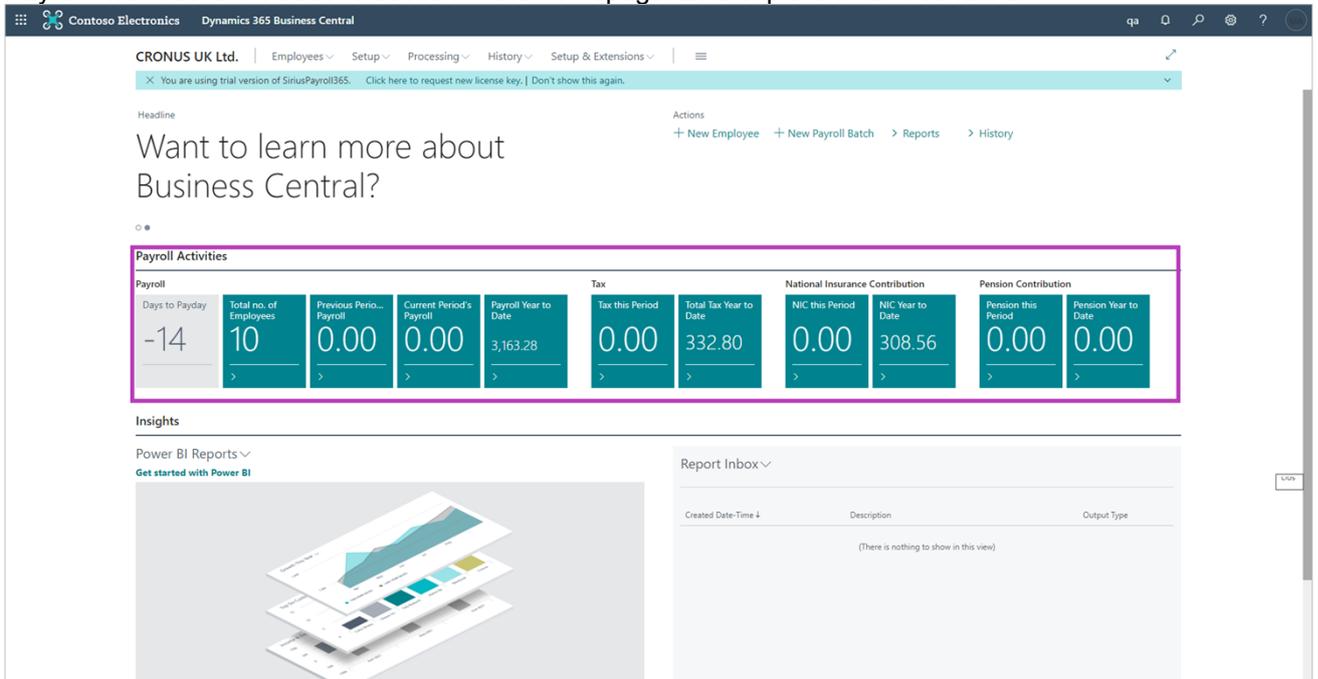
The last two actions within Payroll Actions are 'Reports and History.'



Now that we have an idea of Payroll Actions, lets move on to Payroll Activities.

1.5.2. Payroll Activities

Payroll Activities is the second section in the homepage. Lets explore what it contains.



The payroll section within 'Payroll Activities' contains five different cue cards with different important details on them. -The first Grey cue card contains the most important information which is the number of days left till pay day. -The second cue card contains total number of existing employees. We can further click on this card to see the employees. -The third cue card contains the previous period payroll details. -Then, the fourth cue card contains the current period payroll details. -Finally, the fifth cue card contains the payroll year to date details.

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CRONUS UK Ltd. | Employees Setup Processing History Setup & Extensions

You are using trial version of SiriusPayroll365. Click here to request new license key. | Don't show this again.

Headline: Good morning, MOD Administrator!

Actions: + New Employee + New Payroll Batch > Reports > History

Payroll Activities

| Payroll | | | | | Tax | | National Insurance Contribution | | Pension Contribution | |
|----------------|------------------------|---------------------------|--------------------------|----------------------|-----------------|------------------------|---------------------------------|------------------|----------------------|----------------------|
| Days to Payday | Total no. of Employees | Previous Period's Payroll | Current Period's Payroll | Payroll Year to Date | Tax this Period | Total Tax Year to Date | NIC this Period | NIC Year to Date | Pension this Period | Pension Year to Date |
| -14 | 10 | 0.00 | 0.00 | 3,163.28 | 0.00 | 332.80 | 0.00 | 308.56 | 0.00 | 0.00 |

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Report Inbox

| Created Date-Time | Description | Output Type |
|-----------------------------------------|-------------|-------------|
| (There is nothing to show in this view) | | |

The Tax section within 'Payroll Activities' contain two cues showing the 'Tax this Period' and 'Total Tax Year to Date' details

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CRONUS UK Ltd. | Employees Setup Processing History Setup & Extensions

You are using trial version of SiriusPayroll365. Click here to request new license key. | Don't show this again.

Headline: Good morning, MOD Administrator!

Actions: + New Employee + New Payroll Batch > Reports > History

Payroll Activities

| Payroll | | | | | Tax | | National Insurance Contribution | | Pension Contribution | |
|----------------|------------------------|---------------------------|--------------------------|----------------------|-----------------|------------------------|---------------------------------|------------------|----------------------|----------------------|
| Days to Payday | Total no. of Employees | Previous Period's Payroll | Current Period's Payroll | Payroll Year to Date | Tax this Period | Total Tax Year to Date | NIC this Period | NIC Year to Date | Pension this Period | Pension Year to Date |
| -14 | 10 | 0.00 | 0.00 | 3,163.28 | 0.00 | 332.80 | 0.00 | 308.56 | 0.00 | 0.00 |

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Report Inbox

| Created Date-Time | Description | Output Type |
|-----------------------------------------|-------------|-------------|
| (There is nothing to show in this view) | | |

The National Insurance Contribution section within 'Payroll Activities' also contains two cues showing the 'NIC this Period' and 'Total NIC Year to Date' details.

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CRONUS UK Ltd. | Employees Setup Processing History Setup & Extensions

You are using trial version of SiriusPayroll365. Click here to request new license key. | Don't show this again.

Headline: Good morning, MOD Administrator!

Actions: + New Employee + New Payroll Batch > Reports > History

Payroll Activities

| Payroll | | | | Tax | | National Insurance Contribution | | Pension Contribution | | |
|----------------|------------------------|---------------------------|--------------------------|----------------------|-----------------|---------------------------------|-----------------|----------------------|---------------------|----------------------|
| Days to Payday | Total no. of Employees | Previous Period's Payroll | Current Period's Payroll | Payroll Year to Date | Tax this Period | Total Tax Year to Date | NIC this Period | NIC Year to Date | Pension this Period | Pension Year to Date |
| -14 | 10 | 0.00 | 0.00 | 3,163.28 | 0.00 | 332.80 | 0.00 | 308.56 | 0.00 | 0.00 |

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Report Inbox

| Created Date-Time | Description | Output Type |
|-----------------------------------------|-------------|-------------|
| (There is nothing to show in this view) | | |

Finally, the Pension Contribution section within 'Payroll Activities' also contains two cues showing the 'PC this Period' and 'Total PC Year to Date' details.

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CRONUS UK Ltd. | Employees Setup Processing History Setup & Extensions

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Headline: Good morning, MOD Administrator!

Actions: + New Employee + New Payroll Batch > Reports > History

Payroll Activities

| Payroll | | | | Tax | | National Insurance Contribution | | Pension Contribution | | |
|----------------|------------------------|---------------------------|--------------------------|----------------------|-----------------|---------------------------------|-----------------|----------------------|---------------------|----------------------|
| Days to Payday | Total no. of Employees | Previous Period's Payroll | Current Period's Payroll | Payroll Year to Date | Tax this Period | Total Tax Year to Date | NIC this Period | NIC Year to Date | Pension this Period | Pension Year to Date |
| -14 | 10 | 0.00 | 0.00 | 3,163.28 | 0.00 | 332.80 | 0.00 | 308.56 | 0.00 | 0.00 |

Insights

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Report Inbox

| Created Date-Time | Description | Output Type |
|-----------------------------------------|-------------|-------------|
| (There is nothing to show in this view) | | |