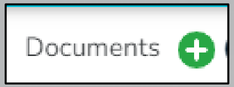
Client Portal User Guide

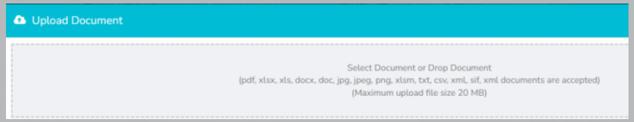
Sending us your Payroll Data

Payroll data can be sent to us via the documents section.

To upload your documents to us select the green circle and a pop up box will appear.



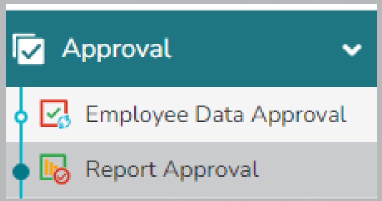
You can then either click on the grey box or drag and drop your files.



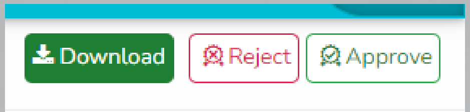
On doing so the below box will appear, the required fields to complete are: Document Type (Payroll File), Frequency, and Tax Period. Once complete you can click the upload button.

Downloading Reports Sent to you for Approval

Once we have processed the payroll we will load reports for you to review. These can be found in the approval section under report approval.



You can select the reports to download them and after your review, you can approve or reject them.



Downloading Pension Files and Ad - Hoc Documents

Aside from the main payroll reports we may at times load other ad hoc documents or pension files to you for your information. These files can be located in the documents section.

And then under the documents tab.

P45's and P60's

These will be loaded to employees' portals. You can also view them in the Employee List section. Note for P60's you will need to change the year at the top to the relevant year.