CleanLink Software Ltd

Site Manager 2023 R2

Release Notes

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Important New Features

SMG-1390 Staff DBS Enhancements

A new DBS tab has been introduced into the Staff screen under the Info tab. This enhances the existing DBS functionality, allowing for more information to be recorded and reported on. New fields include separate Check Type and Status fields, requested, issued and renewal dates, Child Barred List reference, and a section for recording notes.

The original DBS fields remain in place on the Tax tab but are now read-only, and changes to those fields should now be made on the new tab.

Two new entries have been added to the Reports tab, the DBS Staff and DBS Site reports. These allow you to identify staff with or without DBS checks, staff who don't have DBS who work at sites that require one, and allow the new fields to be pulled from the system through CSV extracts.

SMG-1287 Emailing in parallel to improve user experience

A new emailing option has been added that allows large email batches to run separately from the main Site Manager window. This allows you to carry on working in Site Manager while the emails are sent in the background.

To enable it simply right click, select Email, click on Email Parameters and tick the 'Use Site Manager Queue' option. When you next run a payslip batch the emails will be placed in a queue (which can be viewed via the right mouse menu, Email Queue option). Once that's complete a new process will start in a separate window, working its way through the queue one email at a time. You will be able to watch the progress of the email task or return to your main Site Manager window and carry on with more important tasks.

Please bear in mind that the processing of this email queue still has to follow restraints imposed by your email service provider. For example, Office 365 has a limit of 30 outgoing emails per minute, so the existing delay of 2 seconds between emails must still apply to avoid your system being throttled or banned.

This has been introduced to the payslip and P60 emailing routines.

Staff

SMG-1086 Various screens and reports refer to CRB when it should be DBS now

Any references to the old CRB check have been updated to DBS.

SMG-1265 Add DBS Number & Date to Staff Badge Type 5

Security badge format 5 has been updated to show DBS Certificate and Issue dates if present on the staff record. If not, the existing blank space is available for written entry.

SMG-1331 Staff Report showing staff addresses on Staff and Site DBS output

The old DBS reports, available as options in the main Staff Report, now include an option to include staff addresses on the printed and PDF output.

SMG-1420 New security badge format 'D'

In Setups > Setups & Defaults > Formats you can now choose format 'D' for security badges. This includes the employee's name, DBS certificate number and issue date, and their PIN.

At the same time, it is now possible to choose a different image for the logo printed on badges.

SMG-1442 Add Manager to Staff Report

Each employee's manager is now shown on the Staff > Staff Report, option 15. Personal Details.

Payroll

SMG-1342 Holiday Accruals For Leavers

There was an issue where the calculation of accruals for employees leaving the company were not being calculated correctly on offset monthly cycles. This has been fixed.

SMG-1379 DPS Notifications

In Pay > C. In-Year Movements > C. View/Modify HMRC Data Received via DPS, the Previous Pay and Previous Tax values received via DPS updates are now visible in the notification details.

SMG-1402 Salary and NI details visible in P60 Alteration screen

The salary, tax and NI details of employees will now be restricted based on pay cycle access and limits on senior staff.

SMG-1406 Introduce auto-extend feature to SSP diary

The SSP Diary, when opened, will now automatically extend up to 3 months into the future.

SMG-1407 Linked PIWs in the SSP Calendar

There was a problem with the SSP calendar where a linked PIW would not be detected if it was over 3 months in the past. This has been fixed.

SMG-1408 Amendment log for SSP diary

A new log of amendments has been added to the SSP Diary. Click on the new 'Amendments' button to view it.

SMG-1409 Site T&A Reference No

It is no longer essential to have a default T&A interface defined if you wish to enter T&A Reference numbers on Sites.

SMG-1417 Holiday pay incorrect for Fixed staff

There was an issue where holiday pay for fixed-pay staff could be double-counted. This has been fixed.

SMG-1418 Include total paid hours on Payslips

An option has been added to Payslips that allows a line to be included on each payslip that shows the total number of paid hours across all sites.

SMG-1419 Payslip Email Message

The body of text that is included with emailed payslips can now hold up to 32,000 characters.

SMG-1421 FPS CSV Extract reporting Start/Leaving dates incorrectly

In Pay > C. In Year Movements > L. FPS CSV Extract, the start and leaving dates for the employee were not being shown correctly. This has been fixed.

Invoicing

SMG-1397 Move Invoice Our Ref/Your Ref into separate columns

To assist in the filtering of data, the Our Ref and Your Ref fields have been placed in separate columns in Sites > Invoice History, Invoicing > One-off Invoices and Invoicing > Cycles > All Sites Summary.

SMG-1447 Change default invoice number range in Batch Print

Previously, the batch print of invoices defaulted to the first invoice number in the system. If not changed, this could result in all invoices being printed and/or emailed. This initial default has now been changed so that the system will ask you to choose the start of the number range, and will not let you proceed until a number has been chosen. If you choose unprinted invoices only it will default to the first unprinted invoice.

Portal

SMG-1434 Sending data to the Portal

In Mobile > V. Send Data To Portal, a 'Cancel & Exit' button has been added to allow you to cancel the request. Clicking on the red ‘X’ button in the window corner has the same effect.

SMG-1307 Portal Staff Surnames

Surnames received from the Portal now allow the same 30 characters as the Staff screen.

Quality Control

SMG-1403 Illegal characters in QC Audit PDF filenames

If a client code contained a backslash this was preventing the QC Audit print from creating PDF files. Backslash has been added to the list of special characters that are removed from the PDF filename.

Stock

SMG-1103 'Stock not Invoiced' Report

In Stock> E. Reports> H. Stock Not Invoiced, a new option has been added to allow you to choose between showing the stock description from the purchase order detail or from the stock master record.

SMG-1416 Delivery Note Printing quotes the incorrect site name

When printing delivery notes, the site name shown in the window title was not from the correct site. This has been fixed.

Worksheets

SMG-1435 Improve filtering options in 'Reconcile Contractor Inv's to W-Sheets' screen

In the Worksheets tab> C. Reconcile Contractor Inv's to W-Sheets, the client code, site number and site name have been moved into separate columns. This allows for more flexible filtering on that screen.

General

SMG-1451 Printing Site Actions

The print of Site Actions now allows more than 5 lines of text to be shown for each action.

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Payroll

SMG-1386 Pence not allowed in Directors' FPS submissions

An issue of reporting pence in LEL values for Directors in the FPS submission was causing a rejection by HMRC. Pence values will no longer be included in this specific circumstance.

SMG-1306 Column names in regular pay export

In Staff > J. Regular Hours Export, the pay cycle's variable column names were not being output correctly. This issue has been fixed.

SMG-1352 BACS Templates

A new PAYDATE+1 tag has been added to the list of available tags in the user-definable BACS templates. It represents one day after the chosen Pay Date. This was added to support the Bank of Ireland format but may be useful in other banks' templates.

SMG-1373 Display of Tax Month in payroll calendar

The box which displayed the details of pay periods in the pay cycle calendar was too small to fit the Tax Month for monthly cycles. This has been fixed.

SMG-1381 Rebuild Regular Pay

In rare circumstances the rebuild of regular pay could crash and cause a problem where either the regular pay was lost or could not be accessed. The way in which the rebuild works has been changed to prevent this from happening.

SMG-1385 NMW School Leavers

Some of the dates used to determine when someone was classed as being able to leave school were incorrect. These have been changed to represent the 2023 school years and are now visible in the NMW/NLW setup screen at Setups > R. PAYE, NI & Staff > X. NMW/NLW Rates

SMG-1389 SSP Qualifying Days

In Setups > R. PAYE, NI & Staff > M. SSP Qualifying Days, the work pattern was displayed as 'NNNNNNN' regardless of the actual setting. This now correctly displays the entered pattern.

Time and Attendance

SMG-1376 CSV Site Export

The CSV export of sites to T&A providers now includes additional columns for the Division Manager, Area Manager and Supervisor for each site.

SMG-1377 CSV Staff Export

The CSV export of staff to T&A providers now includes an extra column for the Area Manager associated with each member of staff, based on the first site found at which they have regular pay.

SMG-1382 T&A Reference for new Clients

When creating a new client, the first site record that was created automatically did not have its T&A Reference set if the T&A parameters required this. This will now be set to '1' if the 'Default New Sites To T&A' box is ticked in Setups > B. Setups & Defaults > External Links.

Mobile

SMG-1348 Sort Codes from Mobiles

Some Android devices were including dashes when returning sort codes to Site Manager. These are now stripped out automatically when importing.

SMG-1387 Hazard descriptions being truncated

Long hazard descriptions entered into Site Manager and sent to mobiles were being truncated when a hazard assessment was sent back from the mobile device. The import back into Site Manager now supports the full length.

Staff

SMG-1372 Email validation

The validation of email addresses has been altered to include a dash before the '@'.

Stock

SMG-1276 Search on product descriptions in purchase orders

In Stock > I. Create Stock Purchase Order, the product description is now in its own column so can be sorted and filtered.

Invoicing

SMG-1346 Database locking

When editing one-off invoices there was a problem with the message that informs of a database lock, which was missing out the name of the user who was causing the lock. Now the name is displayed.

At the same time, an issue was found in the invoice printing that could cause unnecessary locks on the Sites file. This has been resolved too.

SMG-1347 Correct Posting button

In Invoicing > J. Post Receipts From Clients > A. Individual Postings, you could not click on the Correct Posting button without triggering the validation on the Client No field. This has been fixed.

Quality Control

SMG-1333 Include in QC indicator

When creating a new Client or Site, the 'Include in QC' indicator will now be ticked by default.

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Payroll

SMG-1296 2023/24 Statutory Release

This release of Site Manager includes all of the updated rates and thresholds for the 2023/24 tax year.

SMG-1327 FPS/EPS Submissions

The time taken to generate the XML file for RTI submissions to HMRC has been reduced. This will be particularly beneficial on larger payrolls.

SMG-1205 Leaver's Holidays

Staff > A. Staff Maintain> Holidays tab: There was an issue where the 'Paid £' figure in the staff holiday tab was not being updated by leaver's holidays. This has been fixed.

SMG-1310 P60 Alteration Export

Pay > E. Year End > M. P60 Alteration: The NI Class was being padded with unnecessary zeroes that made it difficult to see. This has been fixed.

SMG-1326 Partial Calculation

Pay > A. Pay Cycles > F. Calculate: In certain circumstances the partial pay calculation was not correctly populating the LEL. This has been fixed.

SMG-1329 Period PAYE Report

Pay > A. Pay Cycles > H. Reports > D. PAYE Period Report: A PDF option has been added to this report.

SMG-1303 Backdated Holiday Pay

Pay > A. Pay Cycles > B. Pay By Staff > Select button > Holidays button: Backdated holiday pay that fell outside of the current pay cycle could lead to hours being removed from the current pay cycle. This has been fixed.

Time & Attendance

SMG-1311 CSV Interfaces

Setups > B. Setups & Defaults > External Links tab: It is now possible to add more than one CSV interface for the Time and Attendance system.

Staff

SMG-1274 SSP Diary

Staff > A. Staff Maintain > SSP button: The SSP Diary now uses colour coding to help differentiate between the various event types. A default colour scheme is provided but each user can choose their own by clicking on the Colours button.

SMG-1328 SSP Diary

Extra validation has been added when creating a SSP diary for staff who did not previously have one.

SMG-1288 Holiday Cleardown

Pay > E. Year End > G. Clear Holidays: New options have been added to the Holiday Cleardown process to give greater flexibility when transferring Brought Forward balances into the new holiday year. You now have the option to transfer negative balances only, positive only or both.

SMG-1317 Staff Reviews

Staff > A. Staff Maintain > Info tab > Reviews button > Report: It is now possible to enter a staff id range when printing reviews, allowing more than one person's reviews to be printed at a time. It is also possible to filter on specific form types.

An extra report type has been added, List of reviews, that prints a simple list of staff ids, forms and dates received.

Invoicing

SMG-1315 Sales Receipts

Invoicing > J. Post Receipts From Clients > A. Individual Postings: There was an issue when posting some sales receipts that prevented them from being updated. This has been fixed.

Stock

SMG-1314 Stock Issue from Supplier Import

Stock > L. Import Stock Issues from a Supplier: If an imported CSV file contained invalid stock codes it could cause duplicate Document Numbers on some of the other imported lines. This has been fixed.

SMG-1320 Issue Stock To Sites

Stock > A. Issue Stock To Sites: After selecting a stock code, when creating a new issue, the cursor was no longer parking in the Quantity column. This has been changed back to how it used to behave.

SMG-1322 Issue Stock To Sites

The OK & Exit buttons on the stock code picklists were not closing the screen.

SMG-1318 Stock Depots

Stock> F. Setup & Maintain Stock/Service Items: When creating a new product the question about setting default Depot quantities was not appearing. This has been fixed.

Quality Control

SMG-1321 QC Emails

Automated emails were displaying unwanted special characters that weren't visible in the setup screen. This has been fixed.

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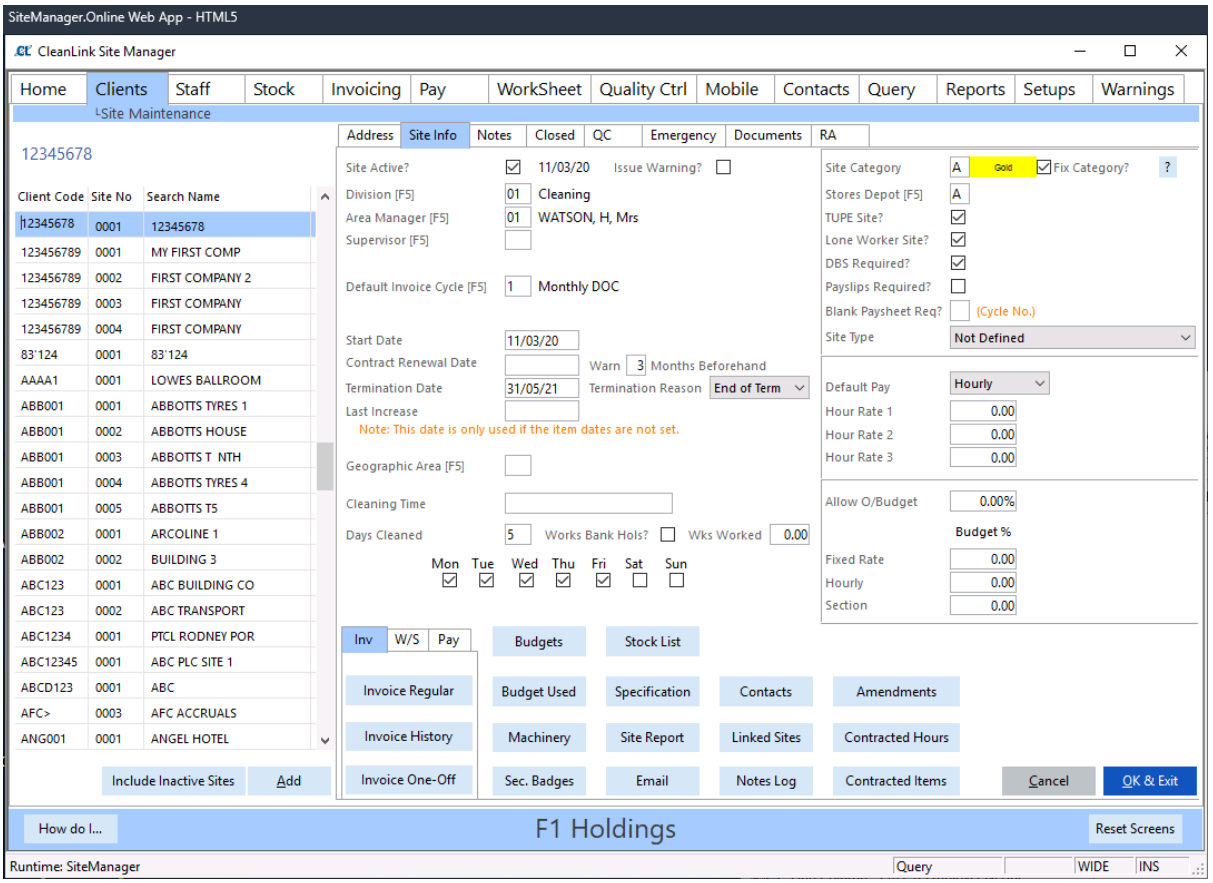
New Look Site Manager

Our Ref: SMG-1271

Changes have been made to provide CleanLink Site Manager with a refreshing new look, with changes made to colourways used and the display of buttons. All functionality remains the same.



Payroll

Our Ref: SMG-1153

Pay> Pay Cycles: Opening of newly created pay cycles was previously not possible without running the year end clear down, this was unnecessary and has been fixed.

Our Ref: SMG-1156

Pay> Print P60s: When sending P60s by email, the system was attempting to send P60s for employees without an email address resulting in errors, this has been fixed.

Our Ref: SMG-1169

Pay> Year End Clear Down: It had been possible to complete the year end clear down after pay cycles in the new tax year had been opened and processed causing issues to employees YTD figures; preventative measures have been put in place to stop this.

Our Ref: SMG-1255

Pay> WP Pension> Cyclical Automatic Re-enrolment> Opt Outs: When processing WP Pension Opt Outs following cyclical re-enrolment, the system was incorrectly refunding all pension contributions. This has been fixed.

Our Ref: SMG-1256

Pensions> Directors' NI: A problem where inappropriate NI refunds were being created for Directors moving NI Class has been fixed. Directors NI Threshold tables have also been introduced to reflect the changes made to the 2022-23 Primary Threshold for Directors.

Time & Attendance

Our Ref: SMG-1180

Pay> Time & Attendance: New functionality has been introduced within the reset calendar cycle process to allow Time & Attendance transactions to be made available again after being imported into the pay cycle, this can be used in situations where the pay cycle needs to be reset back to 'Required' status.

Our Ref: SMG-1223

Pay> Pay Cycle> Import T&A Transactions: A new feature has been introduced to allow users to optionally import T&A transactions by specific Division and Area, rather than all transactions being imported at the same time.

Our Ref: SMG-1263

Pay> TUPE Report CSV: The holiday adjustment in days figure is now included in the CSV format of the TUPE Report accessed via Pay> G. Payroll Reports> G. TUPE Report

Staff

Our Ref: SMG-1163

Staff> Staff Maintain> Attachment of Earnings: Developments have been made to prevent users from deleting attachments when payments have been taken via the pay cycle to prevent issues occurring with HMRC. A delete button has also been introduced for situations where attachments can be deleted.

Our Ref: SMG-1234

Staff> Starter Info> Signature> Print: The printout of staff starter information was limited to just one page, causing issues when the terms and conditions contained a significant amount of information. This has been fixed to allow the T&Cs to be spread across multiple pages and printed in full with the employee signature.

Our Ref: SMG-1270

Staff: The validation of free format Staff IDs has been introduced to prevent users from creating staff records with no Payroll number which are subsequently deleted automatically by the system.

Our Ref: SMG-1279

Staff > Info > Reviews: A problem that was preventing review photos from appearing on the expanded report has been fixed. Also, there is now a ‘Save To File’ button that allows images to be saved from the preview screen.

Invoicing

Our Ref: SMG-677

Invoicing> Regular Invoice Lines: The system has been updated to prevent users from inadvertently entering an apostrophe (‘) instead of a hash (#) when entering a text line, the presence of an apostrophe was causing the export to accounts import to fail.

Our Ref: SMG-1277

Invoicing> Text Lines: Some Mac users were unable to enter a # symbol to invoices/credits for text lines using their keyboard. To resolve this a ‘#’ is automatically populated in the Product Ref field when adding a new line to One Off Invoices and within the Invoice Cycle. The reference can be edited in the usual way to select a different product reference from the picklist.

Stock

Our Ref: SMG-1209

Sites> Create Site Stock List: New functionality has been introduced to allow users to copy a Site Stock List, with accompanying special prices, from one Site to another. This is available within Clients> Maintain Sites> Site Stock List> Load Items> select ‘Other Site’s Stock List’.

Our Ref: SMG-1242

Sites> Site Stock List Prices: The system has been developed to allow users to refresh Site Stock List prices with the Master Stock List prices, provided the Site Stock List price is greater than zero. This functionality is available via Setups> AA. Advanced> X. Import/Amend Data> M. Refresh Site Stock List Prices, but should be used sparingly.

Our Ref: SMG-1250

Stock> Stock Screens: Improvements have been made to the system to make some stock screens full size windows upon opening. New full size screens include: Stock> C. View, Maintain & Invoice Stock, Stock> D. View Past Issues, and Stock> J. Received Stock Purchase Order From Supplier.

Mobiles

Our Ref: SMG-1239

Mobiles > View Received Data> Colours: New functionality has been introduced to allow users to choose the colours used to display the different tasks being received from mobile devices. The colours can be set at Company level in the first instance via Setups> B. Setups & Defaults> Defaults> Misc> Colours button> Imported tab.

Users can choose to override the Company level colours, for their own view only, using the 'Colours' button at the bottom on the View Received Data screen.

Alongside this, a new set of tabs have been added to allow users to view specific task types if they wish, rather than viewing all tasks in one screen.

Our Ref: SMG-1261

Mobile> View Received Data> New Staff: When errors relating to the validation of an employee's P45 data are encountered and displayed on screen in View Received Data> View/Modify screen, this 'Invalid Tax Code' warning was not being cleared down when moving to view a different employee's new starter details which happen to be correct. This has been fixed.

Worksheets

Our Ref: SMG-1281

Clients > Maintain Sites > Work Sheet History > Reprint/Email: It is now possible to include photos that have been attached to worksheets and their tasks when printing or emailing them.

General

Our Ref: SMG-1266

Warnings: A ‘Preferences’ button has been added to the Warnings console that allows users to choose their preferred tab for when the Warnings screen opens. This is user specific and can be reverted back to the system default at any time.

Our Ref: SMG-660

Warnings: A new ‘Clear’ button has been introduced next to the ‘Quick Filter’ field to make clearing this filter easier for users.

Our Ref: SMG-1078

Emailing: An issue in which an error was being reported when trying to send an email to an email address containing a ‘+’ symbol has been fixed.

Our Ref: SMG-1241

Staff> Attachment of Earnings: Changes made to attachment of earnings orders, including changes to Rates used for variable attachments are now recorded in the amendment log accessed via Setups> B. Setups & Defaults> Amendments button.

Our Ref: SMG-1244

Staff> Setup Qualifications: Changes made to the setup of Qualifications are now recorded in the amendment log accessed via Setups> B. Setups & Defaults> Amendments button.

Our Ref: SMG-1251

Actual Site Margin Report> Site Type: It is now possible to filter the reports available within Actual Site Margin report cycles by Site Type. Alongside this, when reports are generated within the Report Cycle, the CSV output will include a column for Site Type for reference.

Our Ref: SMG-1240

Setups> Assets: The Assets screen can now store additional maintenance-related information for items set up as ‘Equipment’. Information can now be added for all Maintenance Contract, Servicing, and Warranty fields.

Our Ref: SMG-1252

Staff> Fixed Pay Import: It is now possible to import in bulk, regular fixed pay for employees paid a salary. This functionality also includes the ability to import Daily Rate figures used for calculating holiday pay for fixed rate employees. Please speak to a member of the support team if you require an import to be completed.

Our Ref: SMG-1260

Office 365 Email: A sporadic email issue affecting a small number of Office365 users was identified and has been fixed.

Our Ref: SMG-1235

Small Errors: Various small errors, mainly typos and truncated notes have been identified. These have been fixed.

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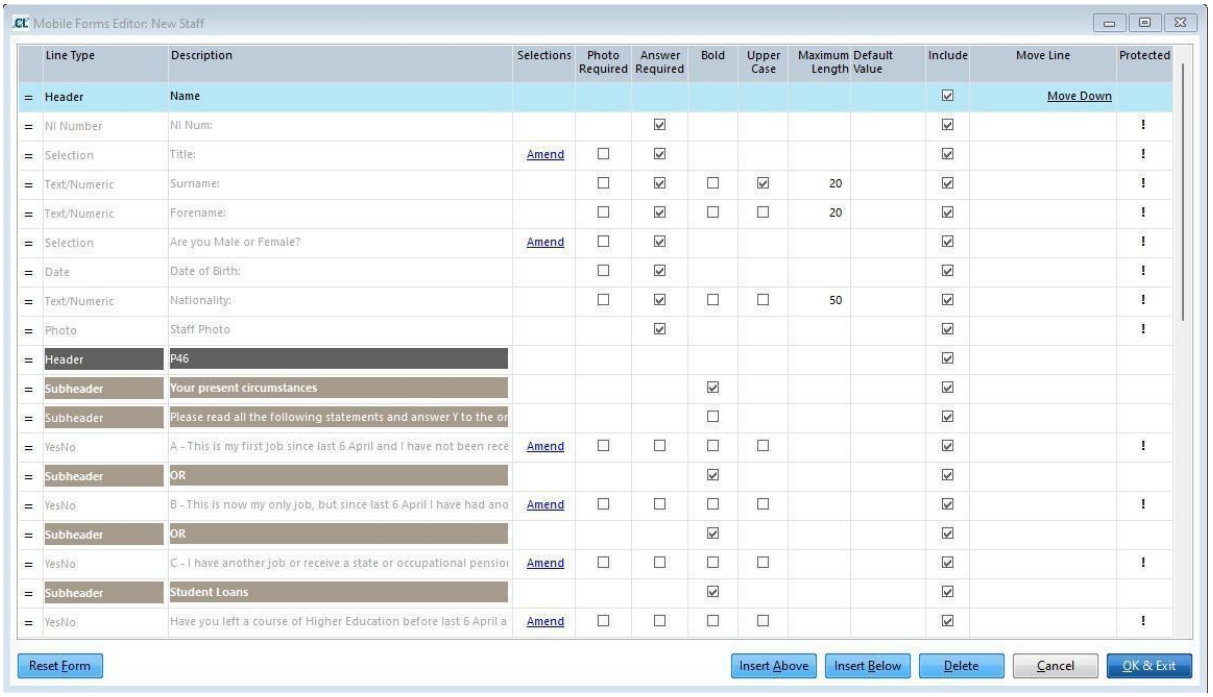
Mobiles

Our Ref: SMG-1095

Mobile Forms> Advanced Forms Editor: New functionality has been introduced to allow users to add and amend sections and questions on mobile forms to better suit their needs. The new Advanced Forms Editor option is compatible with both iOS and Android Apps. (iOS version 4.0.0 and above, Android version 2.5.0 and above)



In addition to this new approach to mobile forms design, the advanced editor New Starter Form on the CL Mobile App now allows users to enter the specific 'Work Pattern' when setting up the new employee which can then be checked and amended, if necessary, in the Mobile tab> P. View Received Data> New Staff> Job tab prior to being imported and the new staff record being created.

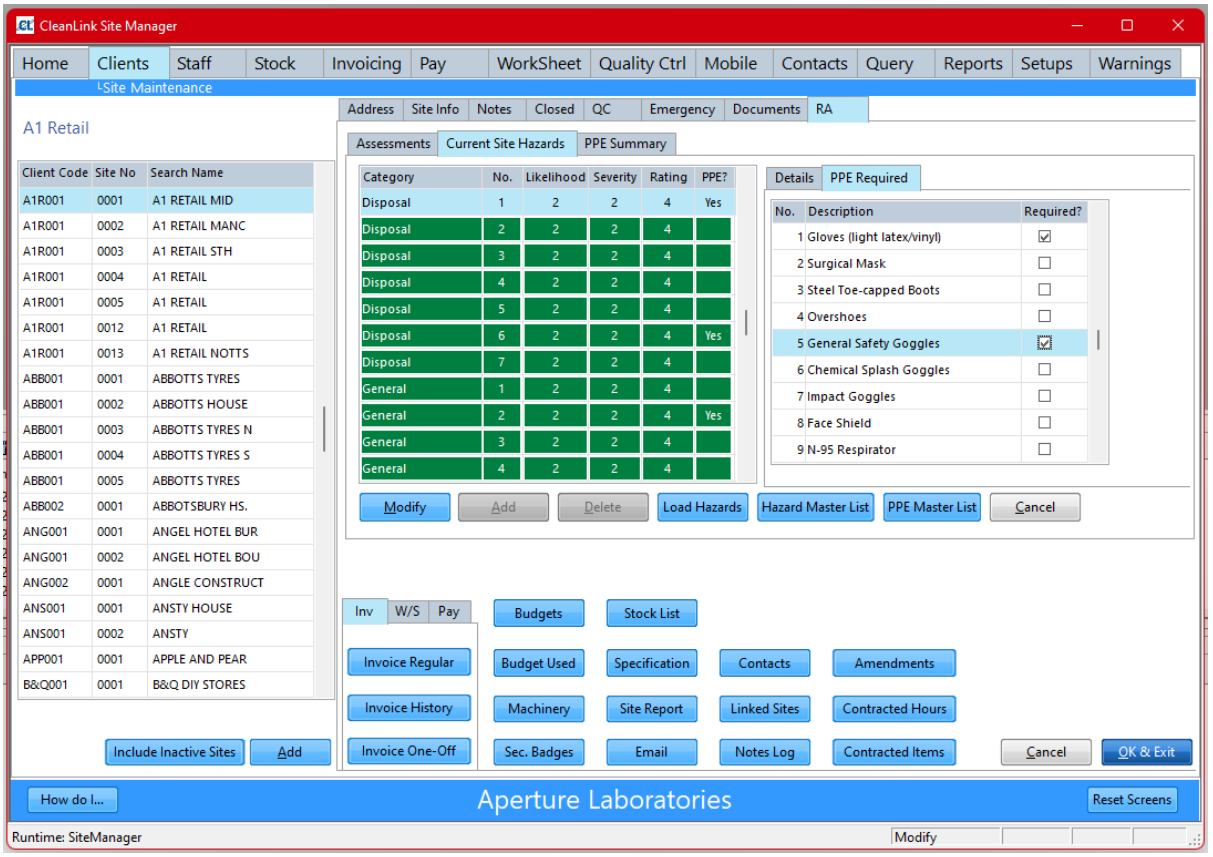
Full details of how the Advanced Forms Editor functionality works can be found in the CleanLink Site Manager Advanced Forms Editor document found in the CleanLink> Crib Sheets folder.

Our Ref: SMG-1186

Mobile Risk Assessments: Developments in both Site Manager and the CL Mobile App for iOS now allow users to create Risk Assessments via the CL Mobile App for iOS (version 4.0.0 and above). Users will be able to complete risk assessments as well as adding and updating Site hazards before sending the details back to Site Manager. Completed Risk Assessments will be stored in the Site> RA tab after being imported into Site Manager.

Our Ref: SMG-1198

Risk Assessment> PPE: A new PPE tab has been added to the Site> RA tab to better facilitate setting up and allocating Personal Protective Equipment to Site hazards.



This list of PPE along with the next assessment date will be included in data sent to the mobile devices, which will allow PPE to be added to Risk Assessment information via the CL Mobile App.

Our Ref: SMG-1178

Mobile Worksheets > Multiple Photos: The CleanLink Mobile App for iOS (version 4.0.0 and above) and Site Manager have been developed to allow users to take up to 2 photos with a Worksheet. When sent back from the mobile device, the photos will be visible within the View Received Data screen prior to importing and will be available after import via the Worksheet History screen in the Site record and included in printed PDFs.

Our Ref: SMG-912

Mobile Forms> New 'Send Forms' options: New functionality has been introduced to allow users to choose a number of mobile forms to send to one or more mobile devices using the 'Send Forms' button in Mobile tab> R. Forms (Setup & Send). Users can select one or more forms before choosing which mobile devices to send the forms to. Note: Portal users will see 'PORTAL' listed as an option to send forms to, however at present it is only possible to send the New Starter Form to the Portal as new Portal functionality is under development.

Our Ref: SMG-986

Mobile Stores Orders> Email Notifications: Improvements have been made to allow users of the CleanLink Mobile App to set up automatic email notifications to be sent when Stores Orders are imported into Site Manager. Mobile Notifications can be set up within Clients> B. Maintain Sites> QC tab> 'Mobile Notifications' button. This functionality is the same as is available for Audits and Mobile Forms, the new 'Stores Order' document type has been added to the list of options when setting up mobile notifications.

Worksheets

Our Ref: SMG-1176

Print Signed Worksheets Report: When running the 'Print Signed Worksheets' report via Reports tab> Worksheets tab> Print Unsigned Worksheets, de-selecting the option 'Must be signed?' was not resulting in unsigned worksheets being included in the report when they should have been. This has been fixed.

Our Ref: SMG-1220

Worksheet Tasks: A new 'Tasks' tab has been introduced to allow users to view tasks related to a worksheet when viewing Worksheets through Worksheets> B. Maintain O/S Worksheets> 'View Details' button.

Invoicing

Our Ref: SMG-1121

Regular Invoice Amendments: Amendments to Regular Invoicing viewed via Clients> Maintain Sites> Invoice Regular> Amendments button now display up to 7 digits plus 2 decimal places.

Our Ref: SMG-1218

Sage 200 Export> New 'Cost Centre' field: Sage 200 can now accept details of the 'Cost Centre' in addition to the 'Analysis Code', which is currently exported when present in Site Manager. To allow users to make use of including the 'Cost Centre' in the Sage 200 export, a new 'Cost Centre' field has been added to the Site record and if populated will be included in the export. This field is currently only compatible with the Sage 200 accounts package.

Our Ref: SMG-1217

Opera Accounts Export: It is now possible for users of Opera Accounts package to export their own External VAT codes if populated. These external VAT codes would need to be entered in Setups> I. VAT Rates> External Code field for them to be populated on the Opera export.

Stock

Our Ref: SMG-1210

Stock Reports> Supplier Stock Items Report: A new filter option has been added to the Supplier Stock Items report, accessed via Stock > E. Reports > N. Supplier's Stock Items, to allow users to include or exclude non issue items.

Payroll

Our Ref: SMG-1228

November 2022 NI Rates: Following the mini-budget on 23rd September, which announced the reversal of the recent increase in National Insurance rates, a new set of rates has been issued. These will take effect for pay cycles where pay dates are on or after 6th November 2022.

Our Ref: SMG-1183

Workplace Pension Parameters: Validation has been added to the 'Staging Date' and 'Cyclical Automatic Re-enrolment Date' fields in Setups> R. PAYE, NI & Staff Setups> I. Workplace Pension

Parameters to ensure these fields must be greater than 01/01/2000. Amendment logging has also been added to this screen and is accessed via Setups> Setups & Defaults> Amendments button.

Our Ref: SMG-1219

Bacs Report/Export> Debit Date: The format of the 'Debit Date' field, entered when producing the Bacs report/export has been amended to allow users to either enter the year in 'YYYY' or 'YY' format. E.g. Entering 15/08/22 (2 digit year), will be automatically filled out to become 15/08/2022. Users who prefer to enter YYYY (4-digit year) will be able to do so.

Our Ref: SMG-1224

T&A Global Site Transfer: In the Payroll > Time and Attendance Processing menu, the Global Sites transfer has been modified to exclude sites that do not have a T&A Reference number. However, there is an option to allow these sites to be included, if required. This only affects the adding of sites to the transfer queue, not the final transfer from the queue to the T&A system.

Our Ref:SMG-1232

CSV Timesheets: The CSV timesheet import into the pay cycle was not creating absences when an employee had only rate 2 or rate 3 hours on the selected day. This has been corrected to include any regular hours on the selected day.

Clients & Sites

Our Ref: SMG-1184

Site Budgets> Duplicate Index Message: Some users had experienced a duplicate index message when entering the Budgets screen within the Site record due to a process being called by the regular invoice amendment log; this has been fixed.

Staff

Our Ref: SMG-1202

Statutory Parental Bereavement Pay: Minor improvements have been made to the Bereavement screen in the Staff record to prevent users from accidentally creating records when not intended to do so.

Our Ref: SMG-1216

Staff> Attachments: To reduce the chances of unintentionally selecting an attachment type from the list when zooming using the 'F5' key, a new 'Select' button has been introduced, which users must press to confirm they wish to select the attachment type they are parked on within the list and apply it.

Our Ref: SMG-1226

Staff> Holidays: An issue in the Holiday Log screen has been fixed, where the Deduct From Pay checkbox was being cleared when tabbing between records.

Portal

Our Ref: SMG-1179

Mobile Device Details: To enable users to more easily locate mobile devices on the Portal, the Surname and First name of the user allocated to the device is sent to the Portal and displayed on screen alongside the device's 'username'.

General

Our Ref: SMG-1175

Email Addresses> Repeated Special Characters: Email validation added recently included a feature that specifically checked for and rejected repeated special characters in the email prefix E.g. john--smith@. It has come to our attention that some email providers allow double special characters in the prefix and so this specific validation has been relaxed.

Our Ref: SMG-1213

Email Addresses> Use of Apostrophes: Validation which previously rejected the use of apostrophes in the first part of an email address have been relaxed to now allow them. E.g. duncan.o'neill@...

Our Ref: SMG-1182

Warnings Screen> Stores Tab: Stock Code field shown within Warnings screen> Stores tab has been extended to display 15 characters as previously this was being truncated at 10 characters. The Print option and CSV extract available via the same screen have been updated to include up to 15 characters also.

Our Ref: SMG-1215

Reports Folder Auto-deletion of Files: As a means to reduce the build-up of unnecessary files within the CleanLink> Reports folder the system is designed to automatically delete files after a set number of days if not accessed. The field in which this is set has been extended from 2 to 4 digits meaning this can now be set to greater than 99 days. The default is set to 90 days and can be amended, if necessary, by contacting the Support Team for assistance.

Our Ref: SMG-1207

User Rights: Improvements made to user's rights to refrain users without access to the 'Pay Tab' from being able to view Pay Cycle reports via Reports tab> Payroll tab.

Our Ref: SMG-1222

Reports Tab> Staff Qualifications Report: The Staff Qualifications report was previously being held under the wrong tab; it has been moved to its rightful place under Reports tab> Staff tab

Our Ref: SMG-1170

Small Errors: Various small errors, mainly typos and truncated notes have been identified. These have been fixed.

CleanLink Site Manager 2022 R2

Payroll Module: New Features / Enhancements / Fixes

Our Ref: SMG-1128

National Insurance Contributions (NICs) Threshold Changes from 6th July 2022: A new NICs threshold table has been introduced in line with the Government's announcement in March 2022. The new NICs threshold table is effective from 6th July 2022.

Our Ref: SMG-1084

Partial Calc resulting in session crashing: In certain circumstances it was possible for a user's session to crash when attempting to complete a partial calc whilst others were using the system. This has been fixed

Our Ref: SMG-1132

T&A> Ezitracker Manager Codes: It is now possible to set a hierarchy of Ezitracker Manager Codes within Site Manager. Manager codes can now be entered at Division Manager, Area Manager and Supervisor level, allowing for better flexibility.

Where a manager code exists at Supervisor level, this will be used. If no Supervisor level code exists the system will use the Area Manager level code. If no Area Manager level code exists, the system will look for a Division Manager level code. Where no code is found in the hierarchy, the system will use the Default Manager Code from Setups & Defaults> T&A Interfaces.

Our Ref: SMG-1133

Staff> Jobs> Remove Regular Pay: When removing an employee's regular pay via the Staff> Jobs button, the deletion of the Site would also delete the holiday settings linked to that Site when it shouldn't have. This has been fixed.

Our Ref: SMG-1100

Fixed budgets not pulling into pay cycle: On occasions, where "Do Not Use in Pay cycle" is ticked in Maintain Sites> Contracted Hours and a Fixed Budget is entered within Maintain Sites> Budgets, the fixed budget figure was not being transferred to the pay cycle. This has been fixed.

Our Ref: SMG-1113

Pay Cycle> Amendments Log: Adding Regular Pay; when prompted to add to an open pay cycle, a record of the amendment in the pay cycle was not being created. This has been fixed.

Our Ref: SMG-1114

Mobile Timesheets> T&A Processing> Amending 'Extra' Pay Items: When amending mobile transactions for 'Extras', using 'Next Staff' or 'Prev Staff' buttons in the T&A Processing screen, the previous value entered was being deleted. This has been fixed.

Our Ref: SMG-1125

Year End Pension Report: When running the end of year pension report for the full tax year via Pay> E. Year End> H. P11> 'Pensions' button, the report was not showing data for the first 3 months of a new calendar year. This has been fixed.

Our Ref: SMG-1134

In Year Movements> EPS screen validation: Improvements have been made to better display the payroll period Tax Month and Tax Year to make it clearer to users. Validation has also been added to ensure the month is between 1 and 12 and the year is no less than 2013 and no more than the tax year supported by the current version of Site Manager.

Our Ref: SMG-1135

Payslips: Where both fixed and hourly lines exist for an employee in the pay cycle and their holiday default is set to Hourly Paid employee 'No', the payslip was missing the hourly pay line. This has been fixed.

Our Ref: SMG-1140

Holiday Clear Down: A new pop-up confirmation message has been added to advise users when the holiday clear down process has been completed and how many staff were updated.

Our Ref: SMG-1096

Browse Calc Screen: The Browse Calculation screen now opens and operates in a larger sized window and allows the user to select a tab to then move up and down the list of staff without the tab changing or reverting to the default tab.

Our Ref: SMG-1138

SSP Rate: When calculating SSP the lookup to the current rate was based on the current system date and was not taking the period's pay date into account. Meaning on occasions during the crossover of two tax years, SSP could have been calculated incorrectly. This has been fixed.

Our Ref: SMG-1139

Staff> Pay History> NIC Uplift Message: Printing 2022/23 payslips from Staff> Pay History screen was not including the NIC Uplift message on the payslip. This has been fixed.

Our Ref: SMG-1154

Emailed Payslips: In a very rare scenario it was possible for an employee to receive the payslip of another employee via email. This has been fixed.

Our Ref: SMG-1126

Staff Accruals Report: In some circumstances the Staff Accruals report accessed via Pay> G. Payroll Reports> O.Staff Accruals Report showed an incorrect subtotal for an employee when including the current open pay cycle. This has been fixed.

Clients/Sites Module: New Features / Enhancements / Fixes

Our Ref: SMG-1149

Maintain Sites> Invoice History: Improvements allow the Outstanding column to be sorted on and filtered. Invoice No. column is now parkable, meaning users can easily locate a specific invoice by typing the invoice number in this field.

Staff Module: New Features/ Enhancements/ Fixes

Our Ref: SMG-1137

Locking in Staff Screen: Simply parking on a Staff record previously caused it to be locked in the database, meaning two people could not look at the same employee even if they were not making any changes. The Staff record will now only become locked when you start changing any of its fields on the screen.

Our Ref: SMG-1041

Holiday Amendment Log: A new amendments log has been introduced to the staff holidays screen. This details which user created, deleted or amended holiday records, and includes when changes were made and from which area of the system they were amended.

Our Ref: SMG-1157

Regular Hours Export: 'Site Search Name' has been added to this report, accessed via Staff> Staff Maintain> J. Regular Hours Export.

Our Ref: SMG-1164

Security Badges Print: The DBS Date is now included in Format B of printed security badges.

Our Ref: SMG-1161

SMP Average Weeks: In some circumstances the SMP calculation was not using the correct periods of pay to work out the average. This has been fixed.

Invoicing: New Features / Enhancements / Fixes

Our Ref: SMG-1098

New Regular Invoice Amendment Log: Improvements have been made to better record amendments made to regular invoicing, including the recording of changes to Frequency and Next Due. Amendments going forwards are available within a new Amendments Log button in Maintain Sites> Regular Invoicing. Previous amendments made in earlier versions of Site Manager are still available via an 'Old Amend Log' button.

Our Ref: SMG-1151

One Off Invoices: When manually adding an item of stock which is not present on the Site stock list to an invoice, a message repeatedly pops up advising of this - which can be annoying, especially after acknowledging the message. This message now only appears when moving off the stock code field of a newly created line.

Our Ref: SMG-1160

Setups> Advanced> Amend Invoice Lines: Amending the quantity and unit price of an invoice line did not update the Total Price field when completed within Setups> AA. Advanced> Y. Amend Invoice Lines. This has been fixed.

Stock Module: New Features / Enhancements / Fixes

Our Ref: SMG-658

Stock> Preferred Stock Supplier: A new field has been introduced within Stock> Setup & Maintain Stock/Service Items> Suppliers tab, to allow users to set one preferred supplier for each stock item. When importing a stores order, if a preferred supplier exists for that stock code it will be used on the order. If no preferred supplier is found the system reverts to the Supplier option in the INI file.

Our Ref: SMG-1142

Global Stock Price Update: When completing price increases via Stock> Global Stock Updates> Update Stock Charges the report and update was including all inactive Clients/Sites which created an unnecessarily large report. This has been changed to allow users to 'Include Inactive Clients/Sites' but the default is for them not to be included.

Our Ref: SMG-1143

Below Reorder Level Report: A new filter has been added to the Below Reorder Level report accessed via Stock> Reports> Below Re-Order Level to allow users to decide whether to include items that are not marked as 'Allow on Stock Issue'. CSV and PDF output options have also been introduced for this report.

Our Ref: SMG-1152

Supplier's Own Reference: The Supplier's Stock Ref field has been increased to allow up to 15 characters to be entered. Please note, printed reports which include this field may not be able to fit the full 15 characters on the page, however, the CSV output will include the full 15 characters.

Our Ref: SMG-1116

Posting One-Off Invoices/Credits: In some circumstances the system would crash when the 'Who has Stock Code' button was pressed during the posting of one-off invoices/credits. This has been fixed.

Mobiles: New Features / Enhancements / Fixes

Our Ref: SMG-449

Mobile Worksheets> Timesheets: When a member of staff, who is not set for reg pay at a site, is added to a timesheet via a mobile worksheet it is not possible to set the staff number within the mobile app. New functionality has been introduced to allow users to allocate the staff number by selecting it from a list when within the Mobiles> View Received Data screen.

Our Ref: SMG-1012

Mobile Forms> Question Order Number: When a mobile form contains more than one question it was possible to give multiple questions the same sort order, this would cause the import process to fail. This has been fixed.

Our Ref: SMG-1123

Mobile Devices> Inactive Sites: When exporting Sites to the portal, those marked as inactive, but with a termination date within the past year - were still being included, which allowed inactive Sites to be sent to mobile devices when they shouldn't have been. This has been fixed.

Our Ref: SMG-1022 & SMG-713

Mobile Devices> Last Audit Date & Score: When data was sent to mobile devices, the last audit date and score could be wrong due to the system using all visit types. This has been fixed by now limiting this to use Type 3 visits (Audits) only.

Our Ref: SMG-111

Mobiles> View Received Data> Stores Order: It is now possible to amend and add to stores orders received from mobile devices prior to them being imported and printed. This can be completed via Mobiles tab> View Received Data> View/Modify button.

Our Ref: SMG-726

Mobiles> Display the Location of Mobiles: Recent imports from mobile devices have not been displaying the GPS location of the device. This has been fixed.

Our Ref: SMG-899

Mobile Devices> Missing Photos/Signatures: The wording within the warning screen when photos or signatures have not been received from mobile devices has been improved and now advises these missing items cannot be imported at a later date if the user proceeds to import the audit/form now without them.

Our Ref: SMG-904

Mobile Imports> Discard: When using the Discard button within Mobiles> View Received Data, images that were attached to discarded items were not being deleted. This has been fixed.

General: New Features / Enhancements / Fixes

Our Ref: SMG-1130

Google Mail> App Passwords: As of 30th May 2022, Google stopped supporting the 'Allow less secure apps' feature on their accounts which allowed users to send emails from CleanLink Site Manager using their Gmail account's primary credentials.

To continue to send emails from Site Manager using Gmail, users will need to login to their Google account and set up App specific Passwords via the 'Security > Signing in to Google' section. This process will provide you with a unique 16-character code.

Once an App Password code has been generated for use within Site Manager, the user will need to replace their existing email password with this App Password code via Right Click> 'Email'> 'Parameters' in Site Manager. This code will need to be entered for all email sources and simply replaces the existing password – all other details remain the same.

Please note, where Google Mail accounts are also present in Setups > AA. Advanced > W. Maintain Users > Email tab, the password will also need to be replaced with an App specific Password code. The owner of each Gmail account listed in this section will need to generate their own App Password code to paste into this section.

Our Ref: SMG-1155

Database Locking Messages: Improvements have been made to the locking error message which occurs when users try to update a record that has been locked by another user. The error message now advises which user is causing the lock.

Please note this user ID is picked up from the logged-on PC user and so may not always display as a name, for example, it may display as 'User #43'.

Our Ref: SMG-1150

Email Error Log: A new 'View Log' button has been added to the pop-up message when there is an error with sending emails via CleanLink Site Manager. This allows users to view the details of the error.

Our Ref: SMG-1080

Asset Valuation & Vehicle Usage Report: A new report has been introduced to allow users to report on asset valuation and usage of vehicles. The report includes a number of options to filter the report

by a range of dates, selection of a single vehicle or all, and to run it for just depreciation, all other costs, or everything.

Our Ref: SMG-1141

Site Manager Backups: A progress indicator has been added to the backups screen to advise users of the total percentage progress of the backup followed by the current file being processed.

Our Ref: SMG-1115

Qualifications Setup: Validation introduced to stop users from being able to save a new Qualification without a Qualification Code.

Our Ref: SMG-1111

Small Errors: Various small errors, mainly typos and truncated notes have been identified. These have been fixed.

Our Ref: SMG-1076

Email Read Receipts: Read receipts have been introduced into our more secure SMTP email routine, activated by enabling TLS in your email parameters. Please note that read receipts may not be supported by all email providers, both when sending and receiving an email.

Portal: New Features / Enhancements / Fixes

Our Ref: SMG-1122

Nationality Code: Transmission of Staff to the portal could be prevented if the description text of a Nationality Code included characters that were not within typical 'western' alphabets. This has been fixed.

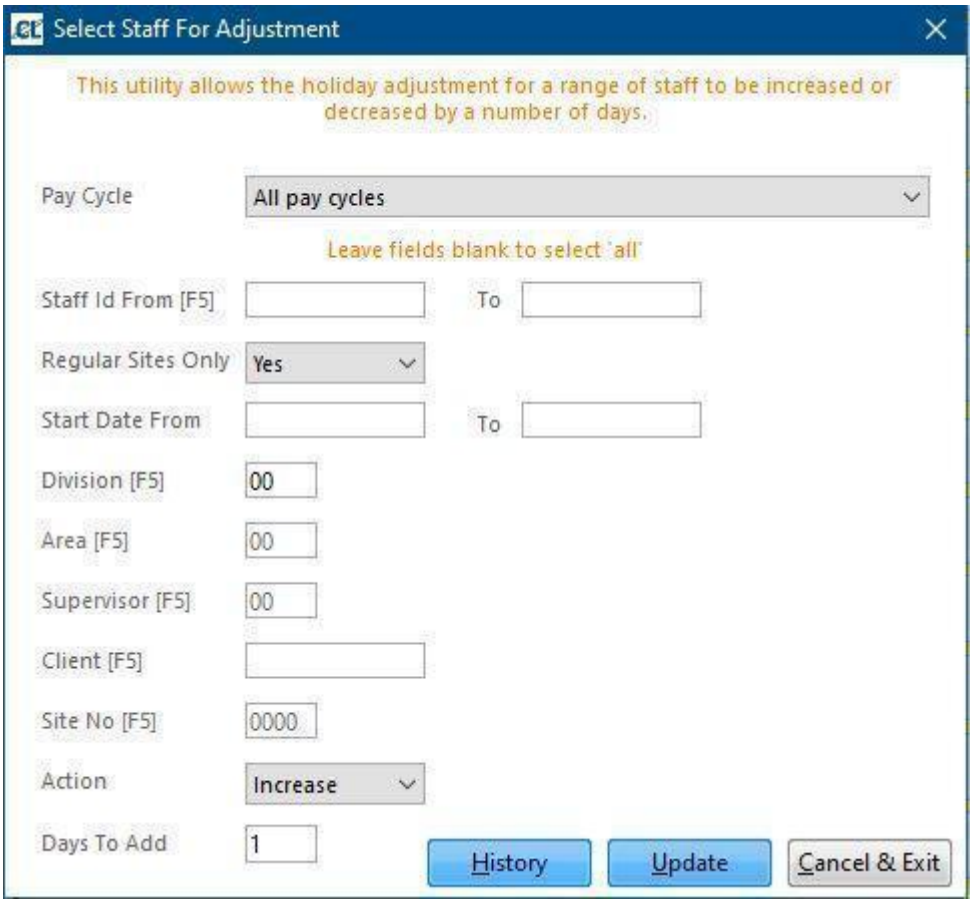
Site Manager 2022

Payroll Module: New Features / Enhancements / Fixes

Our Ref: SMG-1074

Platinum Jubilee> Additional Bank Holiday in 2022: New functionality has been added to allow users to increase or decrease employees' holiday entitlement en masse. This new functionality can be accessed via **Setups> AA. Advanced> AA. Adjust Staff Holidays**, and offers a variety of filters to restrict selection of staff, along with the choice of increasing or decreasing employees' holiday adjustment field.

When run, the old and new values are written to an audit trail that is available from the '**History**' button. A '**Detail**' button shows the options that were used on that particular run, allowing users to reverse the update if required.



The way in which you manage this additional bank holiday will differ depending upon the specific contract you have with your employees. Information on employee's entitlement when an extra bank holiday is granted can be found here

Our Ref: SMG-1025

Health & Social Care NI Levy> Payslip Message: A new message stating "**1.25% uplift in NICs funds NHS, health & social care**" has been added to payslip formats 1 & 8 for the 2022-23 tax year, in line with HMRC's request for employers to explain what these funds will be used for. The message can be switched off via **Setups> Setups & Defaults> Formats tab**, but will default to being 'on' when updating to 'Site Manager 2022'.

Our Ref: SMG-850 & SMG-1036

End of Year Clear Down: Additional measures introduced to improve the clear down process and reduce the number of incidents of the clear down being run multiple times or pay cycles being opened prior to clear down being processed. Measures include:

1. Prevent users from being able to open Tax Mth 1/Tax Week 1 if clear down process has not been completed
2. Prevent users from clearing down pay cycles multiple times
3. Introduce new pop up message to confirm the update of tax codes and clear down process have been completed
4. Allow users to view clear down report at a later date using the new 'History' screen, to view changes made to tax codes etc
5. Introduce an audit trail - see when cycles were cleared down and by whom.
6. Added a check to see if unprinted P45s exist for closing tax year.

Our Ref: SMG-571

P35 Continuation: When running the P35 Continuation Report, via **Pay> E. Year End> F. Print P35 Continuation**, for a specific pay cycle only, the report contained no details, this has been fixed.

Our Ref: SMG-567

P11 Report> Subtotal fields: One of the subtotal fields on the P11 report incorrectly showed WFTC as the description when this should have been named 'Salary Sacrifice'. This has been fixed.

Our Ref: SMG-994

BACS Report: A new progress bar has been added to the BACS report process to allow users to see the system is processing the BACS file as requested.

Our Ref: SMG-1018

Late FPS Reasoning: Validation has been added to the 'Late Payment Code' when submitting FPS to HMRC later than the defined pay day. Users must now choose one of the accepted reason codes before being able to submit the FPS late.

Our Ref: SMG-1049

Staff Check Report> Below NMW: Improvements have been made to the Staff Check report and Anomalies & Summary Report within the Pay Cycle to report if an employee is being paid below the NMW rate.

Our Ref: SMG-1067

Pay Cycle> Contracted Hours Budget: When changes were made to regular pay whilst there was an 'In Progress' pay cycle, and the user selected to apply the changes to the open pay cycle, the contracted hours figure in the pay cycle was being accumulated, rather than cleared out and re-calculated. This has been fixed.

Our Ref: SMG-1051

T&A> Report on Transactions> Sort Order: The transactions report accessed via **Pay> I. Time & Attendance Processing> E. Report on Transactions**, sort order options have been extended to allow this report to be with 3 different sort order options:

1. Client/Site order, with Subtotals for each Site
2. Staff/Client/Site order, with subtotals for each Site
3. Staff/Date order, with subtotals for each Employee

Our Ref: SMG-1065

Benefit in Kind: The system has been updated to use the start and end dates of the pay reference period rather than pay date when identifying whether to include BIK in the pay cycle.

Our Ref: SMG-1073

T&A> Ezitracker> Export of Staff details: Some fields, including email addresses, were being truncated when exporting staff details to Ezitracker. This has been fixed.

Our Ref: SMG-250

P45 Address Lines: Font sizes on all address lines are now all the same.

Our Ref: SMG-762

Statutory Payments> Review Parental Pay: A review of parental pay options within Site Manager have been completed, statutory leave option descriptions updated and withdrawn leave options removed.

Our Ref: SMG-770

Post-Employment Notice Pay (PENP): Changes to the treatment of termination payments introduced and post-employment notice pay for income tax in line with regulation changes in April 2021.

A new PENP pay item has been added with a cost code of BASICPAY. This can be amended by going to Setups > K. Payroll Cycles > Pay Items.

Our Ref: SMG-1090

Holidays> CSV Timesheet Import into Pay Cycle: When holidays were imported into the pay cycle via the CSV Timesheet import option the system was not using the same checks for holiday entitlement as the Excel Timesheet import, meaning some employees were exceeding their entitlement. This has been fixed.

Our Ref: SMG-1105

Pay Cycle> P32 Report: On very rare occasions the P32 report would incorrectly attribute maternity/paternity pay item into the incorrect field. This has been fixed

Our Ref: SMG-1106

NMW / NLW Update> Purged Employees: Employees who have been purged under GDPR were included on the NMW / NLW update report, when there was no requirement for them to be included. This has been fixed.

Our Ref: SMG-1107

T&A> CSV Timesheets: The 'Pay at this rate' column found in T&A Processing> View Amend Logged Times that is populated by the CSV Timesheet import was set to 4 decimal places. This has been reduced to 2 decimal places as the pay cycle uses 2 decimal places only.

Our Ref: SMG-1108

Pay Cycle> CSV Pay Items Import into Pay Cycle: The CSV Pay Items import was not validating the user has entered a path to a folder, but rather a specific file within the folder meaning the import failed. This has been fixed.

Clients/Sites Module: New Features / Enhancements / Fixes

Our Ref: SMG-1071

Site Type Picklist: A new 'Site Type' field has been added to the Site record which allows users to select a Site Type from a predefined list. The new field is included in the Site Browser Format export.

Our Ref: SMG-1075

Site Hazards: Additional fields exported to Portal & Mobile Devices - Site Manager has been enhanced to include the 'Likelihood' and 'Severity' fields in the 'AllSites.xml' exported to the Portal and Mobile devices.

Our Ref: SMG-1077

Creation of Site Stock List: When no stock item existed on a Site Stock List, users were unable to 'Load Items' due to an error in the system. This has been fixed.

Staff Module: New Features / Enhancements / Fixes

Our Ref: SMG-1040

Logged Holidays – New 'Source' field: A 'Source' indicator field has been introduced to allow users to see how holiday or absence records were created. Note: this feature will be available for future logged holidays/absence, not for historically logged holidays/absence.

Our Ref: SMG-979

Tax Regime - Postcode Matching: An internal review of UK postcodes has been completed to ensure current postcode definitions are used when matching the Employee postcode to a specific tax regime country for payroll purposes.

Our Ref: SMG-1030

Staff Count Figures: The Staff count figures visible at the top of the staff list in **Staff> A. Staff Maintain**, incorrectly included leavers. This has been fixed.

Invoicing Module: New Features / Enhancements / Fixes

Our Ref: SMG-934

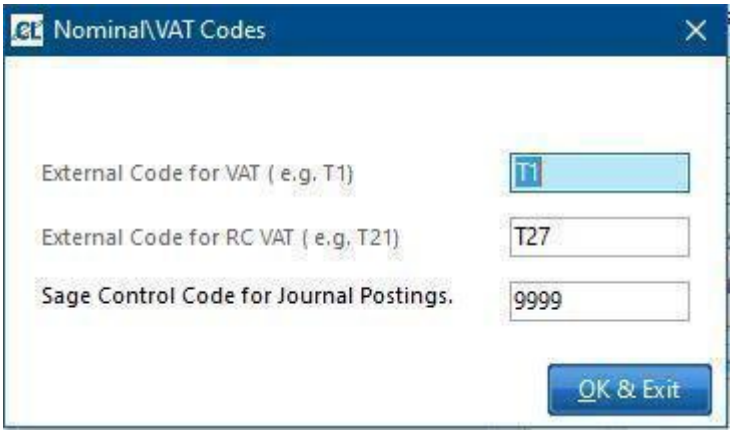
Invoice/Credit List Report: Include text lines - When produced in CSV format with 'Include Invoice Details' field selected, the Invoice/Credit List report, accessed via **Invoicing tab> C. Invoice/Credit List Report**, now includes text lines.

Our Ref: SMG-1083

Emailing Statements: When emailing statements to a selection of Clients, an email confirmation window popped up for each email being sent and required the user to confirm each message to send the email. This has been fixed.

Our Ref: SMG-1089

Sage 50> Export of Invoices> Nominal/External Codes: The Sage 50 invoice export was populating Reverse Charge lines with the incorrect external code. Output of SI/SC lines for an RC invoice is now taken from a new field on the Sage Nominals screen (**Setups> B. Setups & Defaults> External Links tab> Sage Nominals button**). If the invoice contains any RC lines it uses the new field, otherwise reverts to the original.



Stock Module: New Features / Enhancements / Fixes

Our Ref: SMG-1042

Purchase Report By Supplier: The Purchase Report by Supplier, accessed via **Stock> E. Reports> Purchase Reports> T. By Supplier**, was not including stores orders created when importing from mobile devices. This has been fixed.

General: New Features / Enhancements / Fixes

Our Ref: SMG-1004

Email Authentication Errors: Some authentication errors were not being reported when using SMTP to connect to email providers, a new pop up window has been introduced to warn users of email authentication issues.

Our Ref: SMG-1017

Small Errors: Various small errors, mainly typos and truncated notes have been identified. These have been fixed.

Our Ref: SMG-1081

Email Validation: Certain characters were being rejected by the email validation checks when present in the local part of email addresses. This has been fixed.

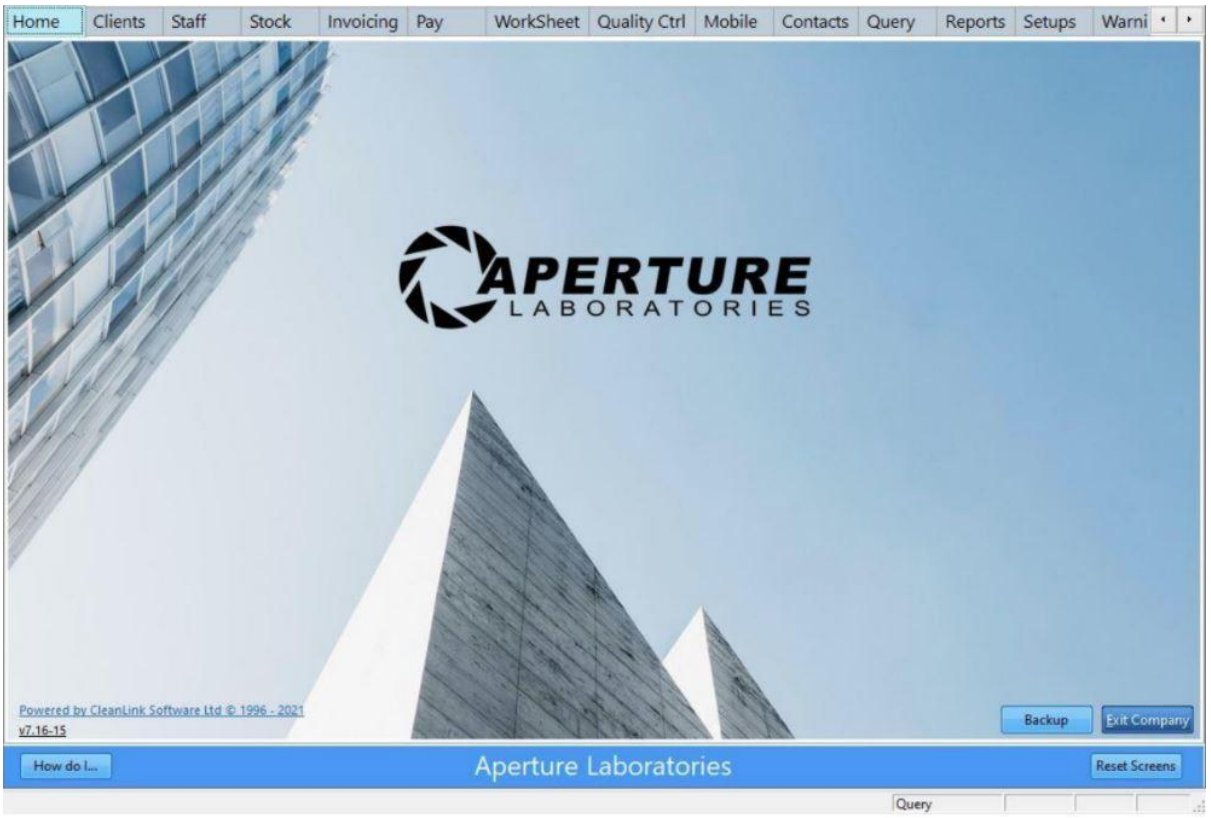
v7.16 New Features / Enhancements:

Our Ref: SMG-198 & SMG-987

Logo / Branding: Site Manager now gives users the option to select their own logo and have it displayed on the Home Screen. This can be set by going to **Setups > B. Setups & Defaults > Setups Tab > Modify** and double clicking in the **'Logo' field** to select a file.

Home Tab Personalisation: In addition to providing the option to select a logo, a facility has been introduced to allow one or more background images to be added, which will be displayed on the Home Tab, either on their own or in addition to the logo. If multiple images are added, these can be displayed as a ***slideshow***. This can be set in **Setups > B. Setups and Defaults > Home Images**.

Example of the Home screen with image and company logo displayed:



Our Ref: SMG-997

Stock: The master stock screen accessed via **Stock > F. Setup and Maintain Stock/Service Items** has been substantially updated. Each stock item now has separate tabs for Stock Details, Depots, Documents, Suppliers, Movements, Notes and Special Prices.

A stock image facility has also been added, with the ability to upload multiple images

Our Ref: SMG-468

Update Stock Charges – Specified Amount: Improvements have been made to the Update Stock Charges functionality found in **Stock > K. Global Stock Updates > Update Stock Charges**. Previously it was only possible to increase items by a chosen percentage. Improvements have been made to now allow users to increase items to a specified amount, allowing more flexibility when needing to increase prices. Users can also now produce a report of the proposed changes prior to updating the stock charges.

Our Ref: SMG-767

Amending New Starter Info: The **Staff > Starter Info > Questions and Supporting Documents** section contains information received from mobile devices, which was not previously modifiable within Site Manager. This has been changed, such that users with the STAFFAMEND right are now able to make changes.

Our Ref: SMG-406

Religion, Gender Identity and Sexuality: Three new fields, Religion, Gender and Sexuality have been added to the **Staff > Name** tab. Options for these are set in **Setups > R. PAYE, NI and Staff Setups > S. Gender Codes**, **T. Sexuality Codes** and **U. Religion Codes**

Please note: Staff Sex is still set using the Sex field on the **Staff > Name** tab. This is the field that is included in payroll transmissions to HMRC; only Male or Female designations are accepted here.

Our Ref: SMG-862

Payroll Reports – Pay Item Code Report: The Pay Item Code Report, accessed through **Pay > A. Pay Cycles > Select Cycle > H. Reports > P. Pay Item Code** or **Reports > Payroll > Pay Codes** now has an extra filter enabling it to be run over a range of periods, rather than just one.

Our Ref: SMG-768

Audit Photos: Previously the only way to view photos associated with a QC Visit was to print out a Completed Audit Report. A new 'Display Pictures' feature has been added, accessed from the **Site > QC** tab. This will bring up a separate table, where the images are displayed along with their details. The images can be printed or exported individually from here.

Our Ref: SMG-467

Vehicles: The Vehicles screen **(Setups > X. Assets and Vehicles**) has been improved to allow more information to be held and reported on, with fields for VIN, Sold Date, Sold Price and Sold Mileage.

New additions include the facility to upload images relating to the vehicle using the 'Images' tab, as well as an 'Expenses' tab where expenses relating to the vehicle can be recorded. A 'Valuations' tab also enables the recording of depreciation.

Specific Warranty and Insurance details can now also be held.

Our Ref: SMG-955

General – Reset Screens: A new button 'Reset Screens' has been added to the bottom right corner of most Site Manager windows. This functions the same as 'Ctrl-R' to reset screens to their default sizes.

Our Ref: SMG-885

Invoice History: Two new columns have been added to Invoice History; 'Total Goods (Net)', and 'Total VAT'. The 'Total' column has been renamed to 'Total (Gross)'

Our Ref: SMG-112

Mobile Imports: When importing New Staff from Mobile Devices it is now possible to view staff documents in full-screen prior to importing and creating the new staff record.

Our Ref: SMG-143

Contracted Hours Export: This export, accessed from **Site> Contracted Hours > Export > All Sites** now includes Site Search Name, Division Code, Division Name, Area Code and Area Name.

Our Ref: SMG-963

Invoice Reports: The 'Your Reference' field has now been added to the **Invoicing > D. Additional Reports > D. Invoices Due** report as well as in **Setups > AA. Advanced > Y. Amend Invoice Lines > Export.**

Our Ref: SMG-966

Payroll: A 'Variance %' column has been added to the **Pay > A. Pay Cycles > Select Cycle > A. Site Summary** screen.

Our Ref: SMG-984

Staff, Clients and Sites: The browser format screens **Staff > B. Maintain Staff Browser Format**, **Clients > C. Maintain Clients Browser Format** and **Clients > D. Maintain Sites Browser Format** are all now enlarged to the full Site Manager Window Size.

Our Ref: SMG-985

Contracted Items: A new Export option has been added to this screen, enabling the user to export Contracted Items for either the current Client/Site, or for All Sites.

Our Ref: SMG-405

Lone Worker Report: This report now also includes the name and number of the first employee on Site.

Our Ref: SMG-241

Payroll: A new validation has been added which prevents users from opening a payroll Cycle in a new tax year until the system has been updated appropriately. This will help to prevent periods from being opened until the necessary Tax rates, NI thresholds, Pension thresholds etc have all been

updated correctly.

Our Ref: SMG-695

Time and Attendance: In **Pay > I. Time and Attendance Processing** > **A. Send Updated Clients/Sites, B. Send Updated Staff**, and **D. View / Amend Logged Times** have all had their screens expanded to fill the whole Site Manager Window. In particular, the changes to the **D. View / Amend Logged Times** screen changes makes it a lot easier to see and amend data.

Our Ref: SMG-961

Time and Attendance: A new filter has been added which is presented when going to **Pay > I. Time and Attendance Processing > D. View / Amend Logged Times**. This allows the user to pre-filter the Time and Attendance data, selecting by a variety of different criteria.

Our Ref: SMG-962

Time and Attendance: The CSV report from **Pay > I. Time and Attendance Processing > E. Report on Transactions** now includes both the T&A data source as well as a flag indicating whether the record has been processed.

Our Ref: SMG-958 & SMG-971

Time & Attendance - CSV Timesheet Import: Various improvements have been made to the detection and handling of Staff with unmatched pay rates when importing T&A transactions. These changes make the import more efficient, reducing the number of exceptions and making it easier for users to identify and deal with any remaining issues.

v7.16 Fixes / Changes:

Our Ref: SMG-953

New Supplier Setup: It was previously not possible to enter a Reference or Search Name when adding a new Supplier. This has been fixed.

Our Ref: SMG-970

Invoicing. Reverse Charge VAT: When an invoice was created from a One-Off Worksheet which included text and service lines and the Client Invoicing was set to receive “ALL Sites on One Invoice” it was not possible to change the service line VAT basis to Reverse Charge. This has been fixed.

Our Ref: SMG-1006

Payroll Locks – Amending Regular Pay: When an employee’s regular pay was amended and the changes were applied to an ‘In Progress’ payroll cycle, this could cause locking for users amending pay within the cycle even if they were located on a different employee/Site at the time. This has been fixed.

Our Ref: SMG-1009

Payslip format: While printing payslips, the hours grid option was not available if the payslips were printed via **Site > Pay History > Tag for Payslip**. This has now been added.

Our Ref: SMG-884

Payroll - Partial Calculation: When using the partial calculation option in the pay cycle to calculate multiple employees, the system would sometimes only calculate the first employee in the list. This has been fixed.

Our Ref: SMG-1020

Payroll – P45 entry: When entering a P45, the system would erroneously raise an error if the previous employment figures were not entered, even though the W1M1 indicator had been selected. This has been fixed.

Our Ref: SMG-956

Staff Browser Export: The csv export of the Tax tab information was not outputting Work Permit Expiry dates correctly. This has been fixed.

Our Ref: SMG-1007

Mobile – Site Requests: A bug was identified whereby Site requests were not always being imported even when set to auto-import, if the Site request did not contain any machinery data. This has been fixed.

Our Ref: SMG-1008

Paid Invoices Report. Unallocated Amounts: It was possible for the Paid Invoices Report (**Invoicing > K. Reports > B. Paid Invoices**) to pick up the wrong Client / Site in the Unallocated Amounts section. This has been fixed.

Our Ref: SMG-872

National Minimum/Living Wage. Regular Pay Rebuild: When uplifting NMW/NLW, Site totals in Regular pay were not updated. This has been fixed.

Our Ref: SMG-506

Holiday Pay: Whilst entering holiday pay by double clicking in an Hours box in the payroll cycle, it was not possible to add Additional Pay in weekly or fortnightly cycles. This has been fixed.

Our Ref: SMG-809

Payroll, Holiday Pay: If an employee has had holidays entered in advance but later moves to a different pay cycle, those pre-entered holidays were being paid in the old cycle, not the new one. To remedy this, a warning has been added to let users know that there is a future holiday booked, and it will need to be removed prior to the employee moving to the new pay cycle.

Our Ref: SMG-812

Payroll, Holiday Pay: Previously, both holiday Pay and Bank Holiday pay would be paid, if (in advance of the Pay Cycle being opened) the Bank Holiday had already been entered via **Setups > Diary Dates**, and a holiday (which started before - and included - the Bank Holiday) was entered. This has been fixed.

Our Ref: SMG-759

Site QC: It was previously not possible to exit from **Maintain Sites > QC > Select Areas** if no existing audit locations were set and the screen was blank. This has been fixed.

Our Ref: SMG-797

Site QC – Copy Audit: When trying to copy an audit from a Site to a new Site, the user was presented with an incorrect error message which advised that a location was required. This has been fixed.

Our Ref: SMG-967

Emails: In various parts of the system, multiple email addresses, separated by a semi-colon were not being validated correctly. This has been fixed.

Our Ref: SMG-968

Regular Invoicing: Previously "#" lines (text lines) were having a VAT code applied to them when an Invoice Cycle was opened. This was causing problems when exporting invoices to Sage. This has been fixed.

Our Ref: SMG-319

Logged Holidays: If the amount to pay value was already populated for a logged holiday, this was not always being updated when amendments were made to the period of absence. This has been fixed.

Our Ref: SMG-975

Client Report: The Site Emergency Contact was not being included in the CSV output of the Client Report, even if "Include Site Emergency Details" was ticked. The emergency contact has now been added to the .csv of this report.

Our Ref: SMG-988

Site Starts and Stops Report: This report, when run in CSV format, truncated the Site name to just 20 characters. This has been fixed.

Our Ref: SMG-990

Mobile Forms: It was possible to create Mobile Forms with a code of '0' (zero), which was causing issues. This has been fixed.

Our Ref: SMG-1002

Reports Tab: When running a Cycle-based report from the Reports tab, the list of Cycles was not refreshed when exiting the company using the 'Exit Company' button before going back to the

Report tab. This has been fixed

Our Ref: SMG-1003

Email: It was not possible to email Statements to anyone other than the default email address. This has been fixed.

Our Ref: SMG-1005

General Notes: When adding General Notes through **Setups > AB. General Notes**, the system would crash if a field was cleared completely. This has been fixed.

Our Ref: SMG-977

Payroll: When entering a note via 'Pay by Staff', for a Staff member of 'Fixed' Type, via the Rate 1 column, the note was not being held, unless the value was also changed. This has been fixed.

Our Ref: SMG-978

Mobile Forms: Previously, imported mobile Forms were assigned a Type by matching the unique Form reference number with previously imported Forms. This has led to a small number of Forms being incorrectly imported as the wrong Type. This mechanism has now been removed and incoming Form Types are now assigned correctly.

Our Ref: SMG-980

EPS Submission: In the EPS submission screen, it was possible to remove all entered data simply by scrolling the mouse wheel. This has now been fixed.

Our Ref: SMG-486

Stock Price Updates: While running the Global Cost Update via **Stock > F. Setup and Maintain Stock / Service Items > Global Cost Update** the progress bar did not disappear once the update had run. This has been fixed.

Our Ref: SMG-439

Site Closed Dates: When a Site was marked as closed and holiday was to be paid, if an offset Cycle was used, not all holidays were picked up correctly. This has been fixed.

Our Ref: SMG-482

Unpaid Invoices and Credits Not Taken Report: When produced as a PDF, the total in the last column of Unallocated Amounts could be cut off in the case of a negative amount greater than £-999.99. This has been fixed.

Our Ref: SMG-501

Adding New Staff: While adding new Staff, if the Cancel and Exit button was pressed to cancel the operation, an error "Tax Regime must be specified" was displayed and the user had to force-close the app. This has been fixed and the Cancel and Exit buttons now function correctly.

Our Ref: SMG-524

Mobile Forms (Staff): When printing a mobile form via **Staff > Info Tab > Reviews**, the photos were not printed on the report, but were shown as the file name. An additional filter has been added to this report, where the user can select either 'Compact Form', which shows only the image file names, or 'Expanded form with photo thumbnails' which includes the photos.

Our Ref: SMG-951

Payroll Staff at Site: In **Pay Cycle > Site Summary > Staff at Site**, there was an overlap of Site Totals figures and the word 'Hours'. This has been fixed.

Our Ref: SMG-896

Staff Pension Report: Running the Staff Pension Report via **Staff > Maintain Staff > Previous/Loans tab > P11 > Pensions** suggested it would be created for one employee only which was incorrect. To improve its functionality, a range option has now been added along with PDF and CSV format outputs.

Our Ref: SMG-410

Site Visit Sheets: Previously, on the Site Visit Sheets, accessed through **Reports > Clients and Sites > Site Visit Sheets** or **Quality Ctrl > G. Report Visit Details** the Division and Area filters did not work. This has now been fixed.

Our Ref: SMG-750

Mobile Export: Occasionally, a 0Kb file would be created when exporting to Mobiles, which would cause the mobile export to stop. This has been fixed.

Our Ref: SMG-954

Pay History: In **Staff > Pay History > Tax and NI**, the "Non-Taxable Pay/Dedn's" figure was doubled up. This has been fixed.

Our Ref: SMG-969

Emails: When emails were sent via the Email button from within the Site record, or the Site Email field was double clicked, the 'Invoicing' email source was being used by default to send the email, instead of the 'General' email source. This has been fixed.

Our Ref: SMG-957

Emails, Payslips: Whilst emailing payslips, the Notes description was being picked up and sent, rather than the notes themselves. This has been fixed.

Our Ref: SMG-973

Staff Jobs export: Previously, with larger data sets, the Staff Jobs export would take a substantial length of time to run, with no indication of progress. An export progress bar has now been added.

Our Ref: SMG-1010

Pensions Extract: The NOW pension extract was not populating the enrolment date for opted in workers. This has been fixed.

Our Ref: SMG-548

Ezitracker - Staff Export: Employees Date of Birth was not being included in data exported to Ezitracker. This has now been added.

Our Ref: SMG-860 & SMG-917

Email Validation: Validation has been added to check that the format of email addresses is valid in various places within the system where they can be entered.

Our Ref: SMG-998

P32, Apprenticeship Levy: Where both weekly-based and monthly pay Cycles existed and Tax month 1 covered March (paid after the 6th of April), the Multi P32 report would see tax month 1 as tax month 12. This could lead to an extra month of Apprenticeship Levy being given incorrectly. This has now been fixed.

Our Ref: SMG-654

Pay Calculation: In very rare scenarios, when cyclical automatic re-enrolment triggered the reinstatement of a pension for a worker that also had other pensions, a duplicate key violation could cause the calculation process to stop. This has been fixed.

Our Ref: SMG-983

Gender Pay Gap: Sometimes it is necessary for this report to 'back calculate' a notional Hourly Rate of Pay by dividing the Pay Amount by the Hours worked. Problems could occur with this, for example where a worker had several lines of pay representing the *same* period of hours, but at widely differing rates. For example, 2 rows of 10 hours, one at £10 per hour and the other at £0.75 per hour, with the additional row effectively representing an uplift in the hourly rate for the *same* 10 hours of work, rather than a stand-alone separate 10 hours of work, paid at an exceptionally low Rate. Pay Rates such as these would lead to spurious results, so a mechanism has been introduced to detect and circumvent them.

SMG-244

Staff Check Report: A warning has been added to show any employees that still have an active COMP (Contracted Out Money Purchase) Pension scheme. Such schemes were abolished in 2012.

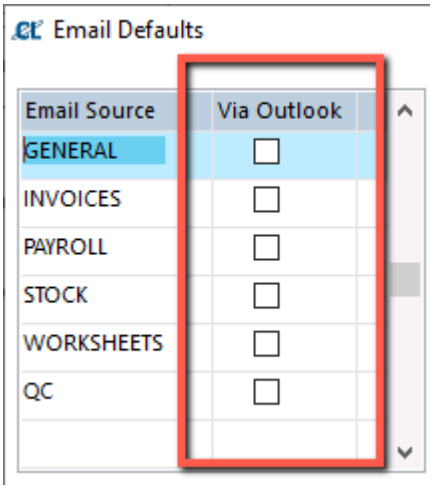
Our Ref: SMG-996

Small Errors: Various small errors, mainly typos and truncated notes have been identified. These have now been fixed.

CleanLink Site Manager Changes for v7.15:

Important!

Advance Notice of forthcoming changes – Email 'Via Outlook' users!



Release 7.15 provides new and improved email functionality that makes the sending of emails 'Via Outlook' obsolete. To improve the security and control of emails, the 'via Outlook' functionality will be **removed** in a forthcoming release of Site Manager. **This is currently scheduled for mid-Autumn 2021.**

We are giving **advance notice** of this change to provide ample time for our 'Via Outlook' users to transition to the new & improved system without disruption.

Why are we making this change?

When Site Manager sends emails 'Via Outlook', it is passing control of the emailing process to the local installation of Outlook that happens to be installed on the user's pc. Outlook will use the current logged-in user's default account as the 'sender' of these emails.

- Site Manager has no ability to ensure this account is indeed authorised to send emails on behalf of the organisation.
- The use of an external program such as Outlook increases the attack surface for malware etc., to potentially manipulate, redirect or otherwise interfere with emails.

v7.15 New Features / Enhancements:

Our Ref: SMG-925

Emails: Previously, each 'Category' of email was associated with a single email account. This has been changed to allow a multitude of accounts to be assigned to each category. Also, each Site

Manager User can now be allowed (or not) to use any of these various accounts within each of the various categories.

This enables users of (say) Invoicing to produce and send invoices using their own designated account by default, or to choose another email account to use from a list of those they have been given delegated access to.

Our Ref: SMG-549

Emails: Site Manager now supports the very latest cryptographic protocol for sending secure emails, 'TLS 1.3'

Our Ref: SMG-927

Emails: Users are now able to disable the use of 'SSL' if they wish to use email servers that do not support this particular cryptographic standard.

Our Ref: SMG-920

T&A reporting: A new report, available in CSV & PDF options has been introduced to show which Sites and their corresponding Staff are using which T&A interface(s).

Our Ref: SMG-932

Site Manager CSV; T&A file transfers: Site Manager now supports the use of SSH File Transfer Protocol (SFTP) for the secure sending and receiving of the Site Manager CSV T&A files.

Our Ref: SMG-918

Reports Tab; Preferences: For self-hosted on premise installations, it is now possible to set a preference for CSV & PDF reports to open automatically rather than just being saved to the Reports or other such folder, similarly to as they do already for our SiteManager.Online customers hosted on the CleanLink Cloud

Our Ref: SMG-936

Tagged for email – Payslips & Invoices: A new 'flag' has been added into the Pay & Invoice history screens to better indicate which records are tagged for email.

Our Ref: SMG-935

User Maintenance: When creating new Users, it is now possible to 'copy' the Rights Profile of an existing user to a new one.

Our Ref: SMG-901

QC Marks History Report: When running the Report Marks report via Quality Ctrl tab> D. Report Marks or via Reports tab> QC tab> Report Marks, it is now possible to generate this report in CSV format.

Our Ref: SMG-947

Payroll – T&A Import: A new 'interface filter' has been added to the T&A import screen within the pay cycle, meaning Customers who use multiple T&A providers can choose whether to import data from all T&A interfaces at the same time or from a selected interface only.

Our Ref: SMG-948

Site Manager CSV import; reject lines without matching pay: When importing CSV data into the T&A holding area, the system attempts to match the pay rates found in the file to one of those found in the employee's pay rates at the specific site. If an employee already has 3 pay rates set and a 4th rate of pay is included in the file, the system will now reject this record and flag it for attention, allowing the user to see the hours, rate, and cash value of the record. The user can then decide whether to pay the rejected record manually via the pay cycle.

Details of the rejected records can also be seen by running the Transactions report via **Pay> I. Time and Attendance Processing> E. Report on Transactions** with the **'Errors Only'** option selected.

v7.15 Fixes:

Our Ref: SMG-306

Payroll, Oddities: Previously, Oddities that were unticked in Staff > Jobs were re-appearing after the cycle was closed. This has been fixed.

Our Ref: SMG-841

T&A, Site Manager CSV: Previously, the Staff CSV extract for transferring data to third party Time & Attendance systems was using an incorrect date format where date fields were being populated, this has been fixed.

Our Ref: SMG-916

Payroll, Partial Calc: Previously, a 'Duplicate Index' error could occur when adding a Site and then logging a holiday at that Site. This has been fixed.

Our Ref: SMG-924

Mouse Wheel; Emails & Batch Print Invoices: Previously, whilst composing a new email, it was possible to inadvertently lose the entire body text if the scroll wheel of the mouse was moved whilst parked on any other field. Similarly, if the wheel was moved when in the Batch Print Invoice screen, the First and Last invoice numbers would be reset to their original values. This has been fixed.

Our Ref: SMG-926

Sites, Invoice Cycle validation: Previously, the Invoice Cycle of the Site record was being enforced even when Invoicing was not enabled and even if Invoice cycles didn't exist. This has been fixed.

Our Ref: SMG-929

Pensions; NOW extract: Previously, once an AVC value for a worker had been output, it would continue to be output against all subsequent rows. This has been fixed.

Our Ref: SMG-930

T&A parameters: Previously, for those customers who didn't have any T&A interface details set, the T&A parameters screen would not allow them to set new ones. This has been fixed.

Our Ref: SMG-933

Staff Review Forms: Previously, the printout of Staff Review forms was truncating the descriptions of questions linked to the Y/N, Date or Score data types. This has been fixed.

Our Ref: SMG-937

New Starters from Mobile: Previously, the validation of the Tax Code field for a new starter received from a mobile was causing problems if the tax code was blank. This has been fixed.

Our Ref: SMG-938

Holidays & half-day absences: Previously, when entering a holiday from within a pay cycle using the 'Book Hols' or 'Holidays' button, it was not possible to amend the details of the holiday once a 'From' date had been entered. This has been fixed. Also, half day absences were being reset back to 1. This has also been fixed.

Our Ref: SMG-939

Pensions: Previously, if a worker removed from a Site was only partially rather than fully recalculated, their pension record for the current period was deleted rather than re-calculated. This has been fixed.

Our Ref: SMG-945

Invoice/Credit Listing Report: Previously, it was not possible to select to generate the report for One Off Invoices only, it only allowed all cycles or periodic cycles to be chosen. This has been fixed.