



# Site Manager 2023

## Release Notes

### Contents

CleanLink Site Manager 2023	2
Payroll	2
Time & Attendance	3
Staff	3
Invoicing	4
Stock	4
Quality Control	4
CleanLink Site Manager Previous Versions	5

## CleanLink Site Manager 2023

### 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.

## CleanLink Site Manager Previous Versions

### CleanLink Site Manager 2022 R4

#### 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.

The screenshot displays the 'CleanLink Site Manager' web application interface. The main window title is 'SiteManager.Online Web App - HTML5'. The application header shows 'CleanLink Site Manager' with standard window controls. A navigation menu at the top includes: Home, Clients, Staff, Stock, Invoicing, Pay, WorkSheet, Quality Ctrl, Mobile, Contacts, Query, Reports, Setups, Warnings.

The main content area is titled 'Site Maintenance' and shows details for site '12345678'. On the left, there is a table listing client sites:

Client Code	Site No	Search Name
12345678	0001	12345678
123456789	0001	MY FIRST COMP
123456789	0002	FIRST COMPANY 2
123456789	0003	FIRST COMPANY
123456789	0004	FIRST COMPANY
83'124	0001	83'124
AAAA1	0001	LOWES BALLROOM
ABB001	0001	ABBOTTS TYRES 1
ABB001	0002	ABBOTTS HOUSE
ABB001	0003	ABBOTTS T NTH
ABB001	0004	ABBOTTS TYRES 4
ABB001	0005	ABBOTTS T5
ABB002	0001	ARCOLINE 1
ABB002	0002	BUILDING 3
ABC123	0001	ABC BUILDING CO
ABC123	0002	ABC TRANSPORT
ABC1234	0001	PTCL RODNEY POR
ABC12345	0001	ABC PLC SITE 1
ABCD123	0001	ABC
AFC>	0003	AFC ACCRUALS
ANG001	0001	ANGEL HOTEL

The main form area contains the following fields and options:

- Address Site Info** (selected tab):
  - Site Active?  11/03/20 Issue Warning?
  - Division [F5]: 01 Cleaning
  - Area Manager [F5]: 01 WATSON, H, Mrs
  - Supervisor [F5]:
  - Default Invoice Cycle [F5]: 1 Monthly DOC
  - Start Date: 11/03/20
  - Contract Renewal Date: Warn 3 Months Beforehand
  - Termination Date: 31/05/21 Termination Reason: End of Term
  - Last Increase:
  - Note: This date is only used if the item dates are not set.
  - Geographic Area [F5]:
  - Cleaning Time:
  - Days Cleaned: 5 Works Bank Hols?  Wks Worked 0.00
  - Days of the week: Mon, Tue, Wed, Thu, Fri, Sat, Sun (Mon-Fri checked)
- RA** (selected tab):
  - Site Category: A Gold  Fix Category? ?
  - Stores Depot [F5]: A
  - TUPE Site?
  - Lone Worker Site?
  - DBS Required?
  - Payslips Required?
  - Blank Paysheet Req?  (Cycle No.)
  - Site Type: Not Defined
  - Default Pay: Hourly
  - Hour Rate 1: 0.00
  - Hour Rate 2: 0.00
  - Hour Rate 3: 0.00
  - Allow O/Budget: 0.00%
  - Budget %:
    - Fixed Rate: 0.00
    - Hourly: 0.00
    - Section: 0.00

At the bottom of the form, there are buttons for 'Inv', 'W/S', 'Pay', 'Budgets', 'Stock List', 'Invoice Regular', 'Budget Used', 'Specification', 'Contacts', 'Amendments', 'Invoice History', 'Machinery', 'Site Report', 'Linked Sites', 'Contracted Hours', 'Invoice One-Off', 'Sec. Badges', 'Email', 'Notes Log', 'Contracted Items', 'Cancel', and 'OK & Exit'.

The footer of the application shows 'Runtime: SiteManager', 'F1 Holdings', and 'Reset Screens'.

## ***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.

## CleanLink Site Manager 2022 R3

### 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)

Line Type	Description	Selections	Photo Required	Answer Required	Bold	Upper Case	Maximum Default Length	Value	Include	Move Line	Protected
Header	Name								<input checked="" type="checkbox"/>	Move Down	
NI Number	NI Num:			<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		!
Selection	Title:	Amend	<input type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		!
Text/Numeric	Surname:		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20		<input checked="" type="checkbox"/>		!
Text/Numeric	Forename:		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	20		<input checked="" type="checkbox"/>		!
Selection	Are you Male or Female?	Amend	<input type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		!
Date	Date of Birth:		<input type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		!
Text/Numeric	Nationality:		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	50		<input checked="" type="checkbox"/>		!
Photo	Staff Photo			<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		!
Header	P46								<input checked="" type="checkbox"/>		
Subheader	Your present circumstances				<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		
Subheader	Please read all the following statements and answer Y to the or				<input type="checkbox"/>				<input checked="" type="checkbox"/>		
YesNo	A - This is my first job since last 6 April and I have not been rece	Amend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>		!
Subheader	OR				<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		
YesNo	B - This is now my only job, but since last 6 April I have had ano	Amend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>		!
Subheader	OR				<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		
YesNo	C - I have another job or receive a state or occupational pensio	Amend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>		!
Subheader	Student Loans				<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		
YesNo	Have you left a course of Higher Education before last 6 April a	Amend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>		!

Buttons at the bottom: Reset Form, Insert Above, Insert Below, Delete, Cancel, OK & Exit

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.

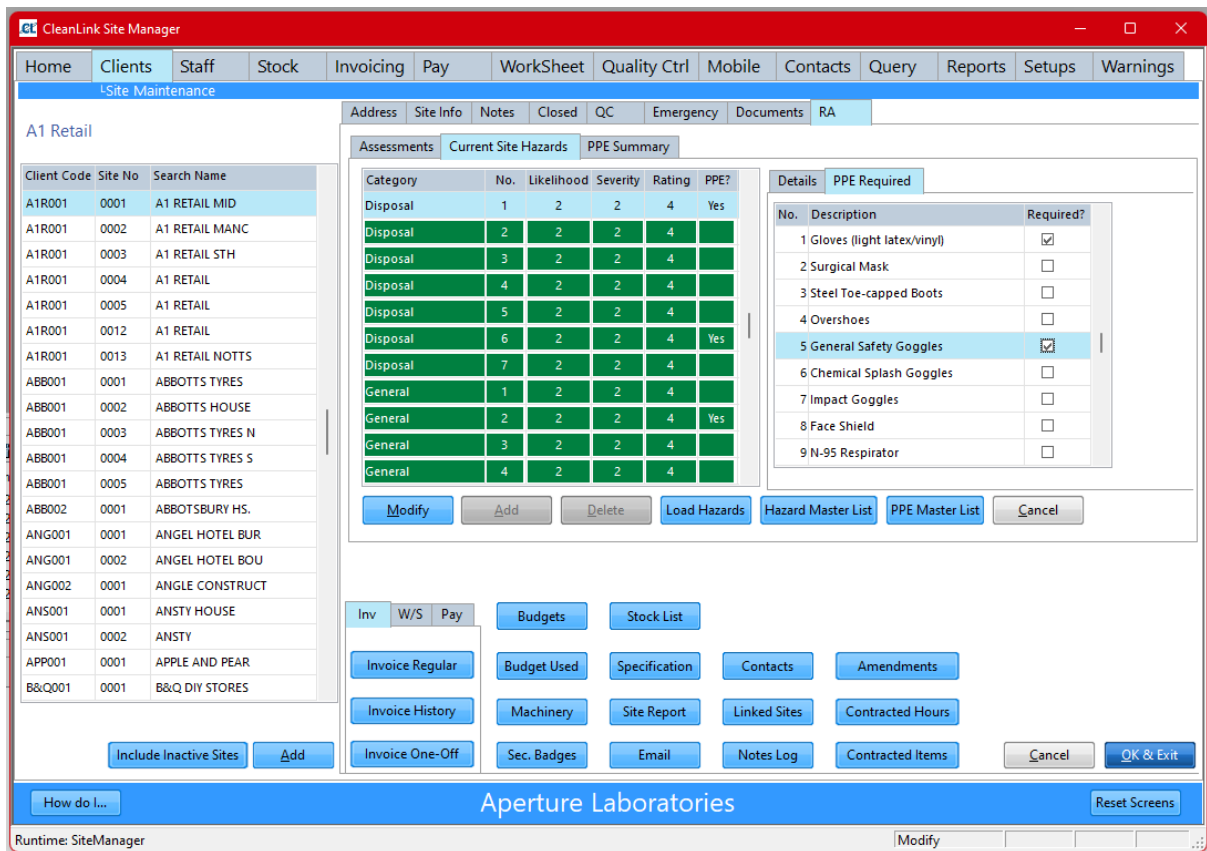
Full details of how the Advanced Forms Editor functionality works can be found in the CleanLink Site Manager Advanced Forms Editor document found in the CleanLink> Crib Sheets folder.

**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.

**Select Staff For Adjustment**

This utility allows the holiday adjustment for a range of staff to be increased or decreased by a number of days.

Pay Cycle: All pay cycles

Leave fields blank to select 'all'

Staff Id From [F5]: [ ] To: [ ]

Regular Sites Only: Yes

Start Date From: [ ] To: [ ]

Division [F5]: 00

Area [F5]: 00

Supervisor [F5]: 00

Client [F5]: [ ]

Site No [F5]: 0000

Action: Increase

Days To Add: 1

Buttons: History, Update, Cancel & Exit

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**

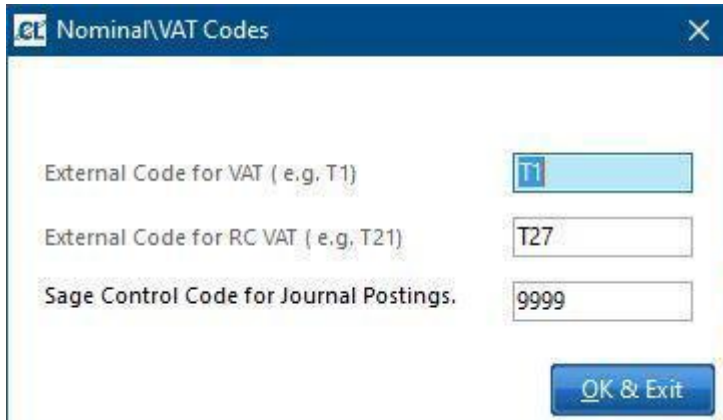
**Invoice/Credit List Report:** Include text lines - When produced in CSV format with 'Include Invoice Details' field selected, the Invoice/Credit List report, accessed via **Invoicing tab> C. Invoice/Credit List Report**, now includes text lines.

**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.

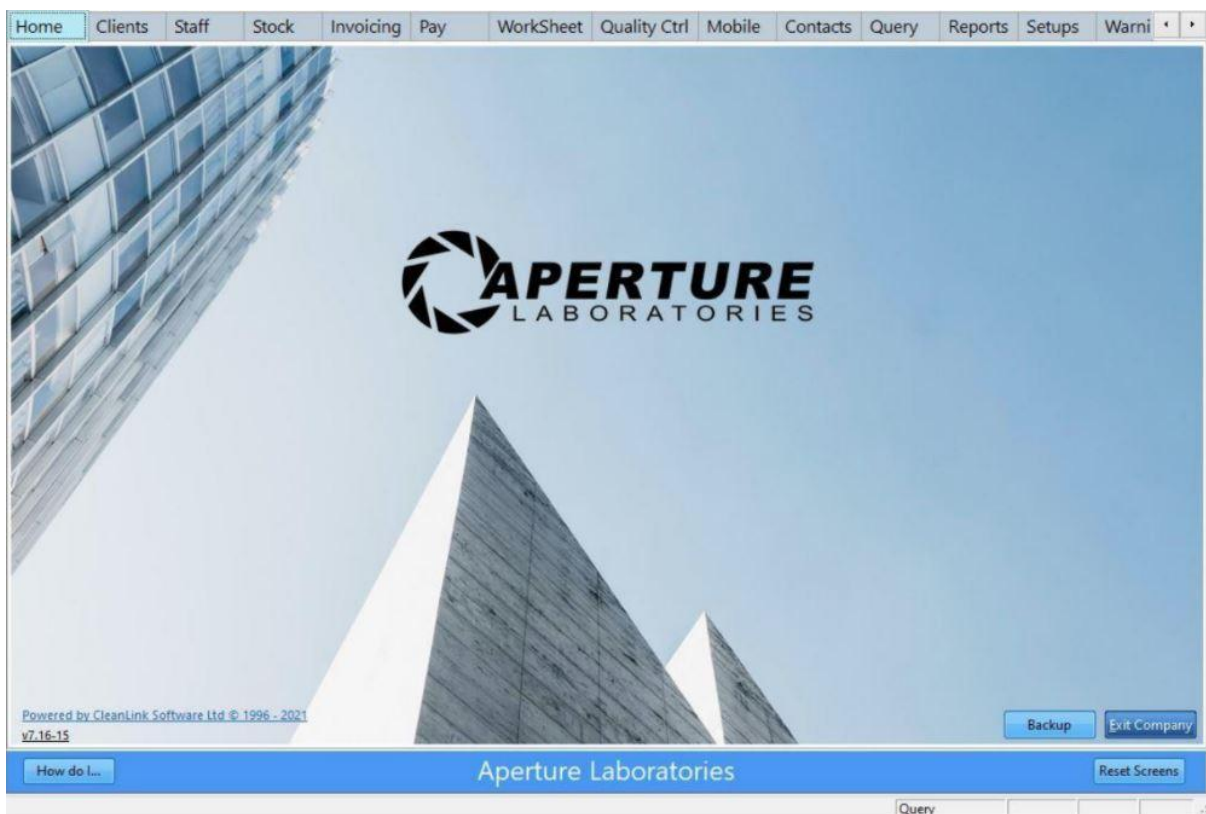
## [v7.16 New Features / Enhancements:](#)

### **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 6<sup>th</sup> 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**

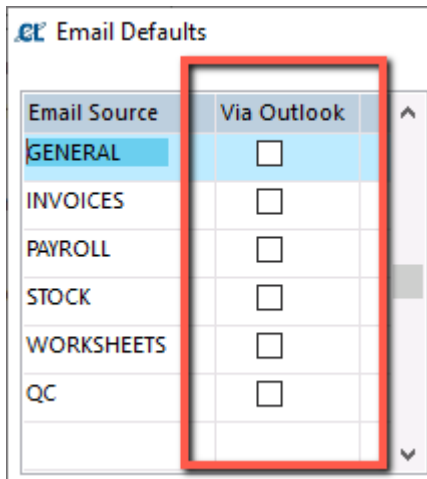
**Small Errors:** Various small errors, mainly typos and truncated notes have been identified. These have now been fixed.



## [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.

- o Site Manager has no ability to ensure this account is indeed authorised to send emails on behalf of the organisation.
- o 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 4<sup>th</sup> 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.

## CleanLink Site Manager Changes for v7.14:

### v7.14 New Features / Enhancements:

#### Our Ref: SMG-828

**Time & Attendance Integration Features; 'Site Manager CSV':** The ability to import and export key datasets - in a format that is native to CleanLink Site Manager - has been enabled by the introduction of a number of new, standardised *generic* import / export programs. Handling **Sites, Staff, Staff Jobs, Absence Codes, Pay Codes, Pay Items** and of course the core **T & A** data itself – the 'who' did what 'hours' on which 'day' for which 'Client/Site' at what 'Pay Rate', and more.

This new functionality will enable you to integrate more easily with other third-party T & A system providers, giving you more freedom of choice to decide how best to gather and process your workforce T & A data. The ability to transfer files at the press of a button via FTP to an external system is also provided.

Specific new functionalities of note are:

#### **Multiple T & A systems can be used; Our Ref: SMG-814:**

It is now possible to map Sites to a specific T & A system / process type, allowing for more than one system to be in use at the same time by different Sites. For example, Ezi-Tracker data might be imported for Sites that are associated with this system whilst other Sites can use (say) the generic Timesheets import. Setting up new T&A Systems and amending existing T&A System details can be done by going to: **Setups> B. Setups & Defaults> External Links tab**

The screenshot shows the 'Company Setup > 1. Inspired Lime' interface. The 'External Links' tab is active, displaying the following sections:

- Accounts Package:** Software Used: Sage 50. Options include 'Export Invoices during Invoice Processing', 'Factored Invoice Export', and 'Allow multi exports' (checked). Ext Acc Dir: c:\Cleanlink\Exports\.
- T&A Common Settings:**
  - Send Clients/Sites: Ask
  - Send Staff: Ask
  - Default New Sites To T&A
  - Pay Overtime
  - Pay If No Regular Pay
  - Post If Oddity
  - Hours Without Break: 0.00
  - Overtime Units Pay (mins): 0.00
  - Break In Minutes: 0
  - Minutes Before: 10
  - Minutes After: 15
- T&A Interfaces:**

T&A System	User Id	Active	Default
EziTracker	RTI@UK2954	Yes	Yes
Telelog		Yes	
Ulysses		Yes	
- Bank Details and BACS Payment Method:** Bank Name: Barclays. Bank Ref Number: 4536453. Debit Acc. No: 4536453. Debit Acc. Type: 251435. Payment Type: HSBC Net. BACS SUN. Bacs Output Path: c:\Cleanlink\Exports\.

**Paid & Unpaid Absence Imports; Our Ref: SMG-838**

**Pay Items Import; Our Ref: SMG-839**

**Sites Export; Our Ref: SMG-840**

**Staff Export; Our Ref: SMG-841**

**Staff Regular Jobs, Pay Items & Absence Codes Exports; Our Ref: SMG-842**

Press [F1] and search in the help manual for 'time and attendance processing interface' for more information.

**Our Ref: SMG-462**

**Time & Attendance; A new simple CSV import into the T&A 'view / amend logged times' screen is now available:** Users can now import a simple CSV file containing T&A data into this 'holding area' whereupon it can be processed according to the established rules for tolerance etc., before being authorised & transferred to the Pay Cycle. This facility opens-up many more possibilities for accepting data from the plethora of T&A systems providers that are now available, in a simple, cost effective way.

**Our Ref: SMG-854**

**Staff; 'Send to T&A':** A new facility has been added to the Staff screen to allow a specific employee to be sent to either:

- a) the T&A systems linked to the Sites they work for
- b) to a single selected T&A system

Option a) is useful for refreshing an employee's details on the systems that they usually link to. Option b) is useful for sending workers to a system they wouldn't normally be linked with, e.g. for cover staff.

**Our Ref: SMG-855**

**Pay; T&A processing:** In Pay > I. T&A Processing, the transfer queue for both Clients and Staff (options A and B) has been improved. Records can now be removed from the queue *en-masse* using a new 'Remove' checkbox and a 'Remove Selected' button.

When in Modify Mode you can tick the 'Remove' checkbox to select any number of records you want to remove. There are 'Select All' and 'Deselect All' buttons to assist. When ready, click on the 'Remove Selected' button and those records will be taken out of the transfer queue.

**Our Ref: SMG-874**

**Pay; T&A processing – ignored transactions:** Transactions that are ticked as 'Ignore' and dated before or within the dates of a given pay cycle are now automatically marked as 'processed' when that pay cycle is closed - so that they are subsequently hidden from view within the T&A Transactions screen.

**Our Ref: SMG-910**

**Payroll, T&A Processing:** The filters available on the View / Amend Logged Times screen have been extended to include Error Code, Absence Code, Source and Batch number. An additional 'Clear' button has also been provided to clear the filters.

**Our Ref: SMG-914**

**Setups, Advanced; Maintain Users:** Users of <https://sitemanager.online/> login with their email addresses rather than their names, Staff numbers or other shortened ID's. The email addresses of their registered users can be seen on this screen alongside the names of their assigned database aliases.

**Our Ref: SMG-373**

**Bulk Email:** Many email servers have limits on the number of emails that can be sent within a given time frame and may drop or even block connections if their rules are broken. To avoid such problems, CleanLink Site Manager can be told to put in a delay between each successive email that it sends, which can help to avoid such problems when (for instance) sending out invoices or payslips. See 'Email Parameters', 'Send Delay'.

**Our Ref: SMG-509**

**Stock; Reports:** Division & Area filters have been added to the Stock > E. Reports > A. By Client.

**Our Ref: SMG-476**

**Payslips; Output to Staff Portal:** Previously, when payslips were output to the Portal, the system would also send a copy of the Staff image too, which could significantly increase the time needed to send out payslips. This was unnecessary as the Staff images are already sent when using the Mobile tab > V. Send Data to Portal, thus this practise has been stopped, which has speeded up the transfer of payslips significantly.

**Our Ref: SMG-869**

**Invoice / Credit list report:** Two new fields have been added to this report: Amount Paid and Date Last Paid. See Invoicing > C. Invoice/Credit List Report.

**Our Ref: SMG-771**

**Invoicing; Invoices & Credit notes:** The standard A4 invoice & credit note prints have been enhanced to optionally display a designated currency symbol, either prefixed or suffixed to the monetary amount:

Worksheet	Quality Ctrl	Mobile	Contacts	Query	Reports	Setups	Warnings
aners Ltd							
Setups	Defaults	Holidays	External Links	Formats			
Separate Credit Note Numbers	No	Prefix					
Last Invoice No	5857	1					
Last Credit Note No	0						
Last Staff No	282						
Last Stock Doc No	771						
Last Work Sheet No	4063						
Last Stock PO No	194						
Last Purchase No	17						
First Day Of Wk	Mon	Only modifiable if NO Calendar					
Budget Period	1	Mth					
Show sales on Pay & Visit sheets	No						
BACS Run SubTotal Every	15	Lines					
BACS Sub Total	Yes						
Number of Stock Delivery Notes	0						
<b>Company Overhead</b>							
Cost	0.00	Per Year					
Split By	Division						
<b>External Stores</b>							
Default No of days for delivery	0						
Invoice No days BEFORE delivery	30						
Print Delivery notes (and not POs)	No						
<b>Invoicing</b>							
Currency Symbol	£						
Symbol Position	Prefix						
Currency to display on invoices e.g. £123.45							
Mix Reverse Charge VAT	No						

**Our Ref: SMG-459**

**Invoicing; View Issued Stores:** A new *'Change Hold Status'* button has been added to this screen to allow users to place all of the items shown within the current filter on hold or otherwise, in a similar fashion to how they can place invoices on hold that are waiting to be posted.

**Our Ref: SMG-232**

**Stock; E. Reports > F. Sales Report by Product:** New options have been added to this report to filter on *'Charged' / 'Non Charged' or 'Both'*, together with *'Branch', 'Division', 'Area', 'Client' & 'Site'* filters and new CSV/PDF filenames.

**Our Ref: SMG-794 / SMG-801 / SMG-815**

**Database & storage options:** A new facility has been added to the system that automatically regulates the sizes of stored images that are downloaded from mobile devices, often at unnecessarily high resolutions. This new system also has options that are pre-set to automatically work in the background to help to maintain a fast and responsive system by purging old logs & reports etc.

**Our Ref: SMG-823**

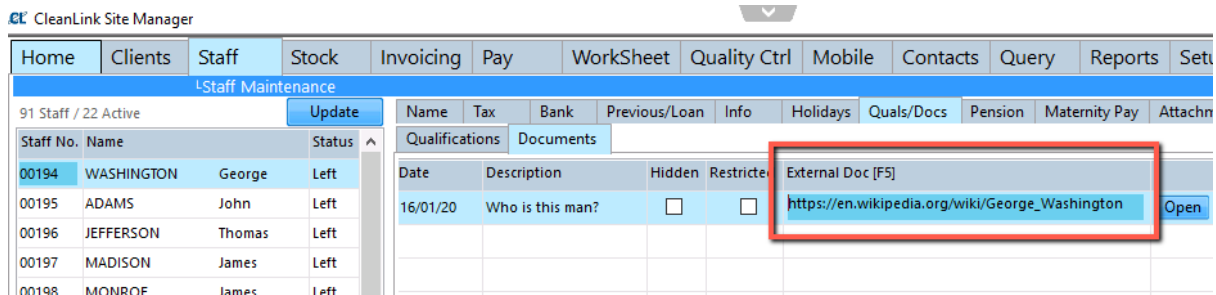
**Coronavirus Job Retention Scheme; Reclaim Report:** This report has been amended to take account of the latest extension of the furlough scheme, together with changes to the respective levels of government vs employer support that are applicable through July, August & September of 2021.

**Our Ref: SMG-851**

**Stock; Advanced Filter:** A new advanced filter button has been added to the Stock/Services maintenance screen to improve the options that are available for filtering the list of stock items.

**Our Ref: SMG-852**

**Staff/Sites; Documents:** It is now possible to refer to documents stored externally on sites such as Sharepoint or Google Drive, by pasting a URL link into the External Doc [F5] field, instead of a path & filename to one held on the local filesystem.



**Our Ref: SMG-868**

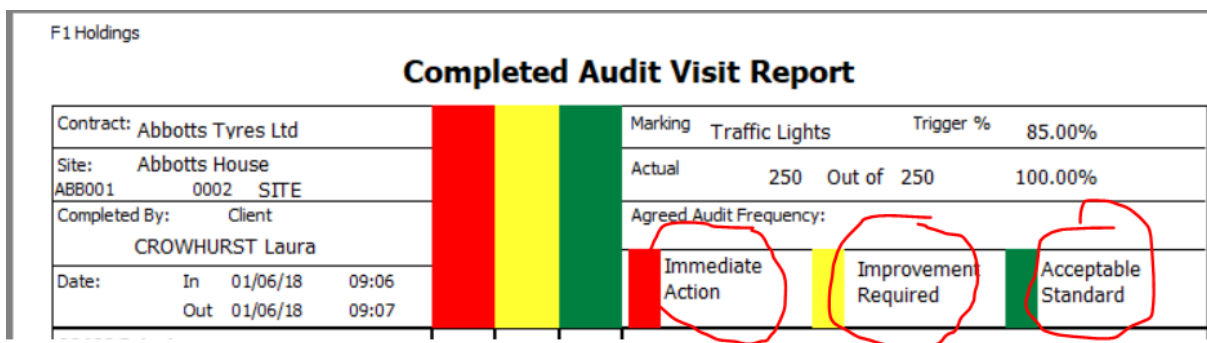
**Mobiles; New starter forms:** It is now possible to optionally make the entry of any of the Hourly Rates and the Hours at Rates fields on this form to be mandatory. Please contact CleanLink Support who can invoke this option or you if so required.

**Our Ref: SMG-879**

**Sites; Browser format screen:** The 'Email for invoices' field has been added to this screen and is also available for export.

**Our Ref: SMG-837**

**Completed Audit Visit Report; text associated with Red, Yellow, Green:** A new facility to customise the text that is displayed for these categories has been added.



See Setups > B. Setups & Defaults > Defaults tab > Misc tab. Translations button:

Phrase To Translate	Translated Phrase
ACCEPTABLE STANDARD	Really Rather Good
IMMEDIATE ACTION NEEDED	Does Not Meet Requirements
IMPROVEMENT REQUIRED	Must Try Harder

Buttons: **Modify**, **Add**, **Delete**, **Cancel**, **OK & Exit**

**Our Ref: SMG-870**

**Worksheets; Invoice Required option:** The 'Invoice Req.' field has been added to CSV report that is available from this screen. A new facility to filter the report based on the settings contained within this field has also been introduced, to enable CSV extracts that contain only those items with this flag set, not set, or both.

**Our Ref: SMG-875**

**Payroll; DPS error:** Previously, when the HMRC DPS system was too busy, the subsequent error message displayed made little sense to users and caused confusion. This has been changed to better explain the problem and to allow the user to simply retry without leaving the screen.

**Our Ref: SMG-883**

**Stock; Amendment's logging:** The recording of user amendments such as 'Depot', 'Supplier' & 'Special Prices' via this screen has been added to the amendments logging system.

**Our Ref: SMG-887**

**Invoicing; Reverse Charge VAT:** Some external systems such as Sage do not allow for export formats to contain both RC and non-RC VAT items within the same invoice. To prevent incompatibility issues arising, a warning mechanism has been put in place to alert users to this potential issue, which they

are free to override if they wish.

**Our Ref: SMG-892**

**Sites; QC:** This screen can now display pictures pertaining to the QC record, with options to add, select & print them.

**Our Ref: SMG-900**

**CJRS; furlough holiday accruals:** The function to move holidays accrued at a furlough Site to the regular Sites that an employee works at, has been extended so that it can continue to operate into the 2021/22 tax year owing to the extension of furlough until September 2021.

**Our Ref: SMG-903**

**Sage Micropay import:** This import has been improved to include the Staff leaving date.