



CleanLink Software Ltd

# Site Manager 2025 R2

## Release Notes

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## CleanLink Site Manager 2025 R2

### **NEW FEATURES**

#### **SMG-1777 SmartTask T&A Integration**

Site Manager now provides a direct integration with the SmartTask time and attendance system, using their API. Staff and sites can be transferred from Site Manager to SmartTask, and worked hours can then be imported from SmartTask into our T&A holding area for review. From there it's just a few clicks to import the hours into our pay cycles.

Contact our Sales team if you want to learn more about this exciting new integration.

#### **SMG-1820/1866 OAuth for Gmail and Microsoft 365**

Site Manager now supports the use of OAuth for sending emails from both Gmail and Microsoft 365 accounts. This provides a secure method of authorising these accounts for use with Site Manager.

This can be configured from the Email Parameters button by Right Click Menu> Email> Parameters. A guidance document is available in the Crib Sheets Folder to assist with the authorisation process.

#### **SMG-1814 New QC Report - Audit Setup Report**

A new report has been added to the Quality Control module, with various options for checking the audit setup for Sites, including being able to report on which Sites do not have any audit locations set up. Go to the 'Reports' tab and look for 'Audit Setup Report'.

#### **SMG-1770 Annualised Pay - Number of Weeks in Full Year**

The number of weeks in a year used in the calculation of Annualised Pay is now definable. By default the system assumes a working year of 52.00 weeks but this can be overridden to meet your requirements e.g. 52.14 is a commonly used alternative.

This setting can be found in the Annualised Pay section of Setups > K. Payroll Cycles > Details

#### **SMG-1836 Mobile Forms> Advanced Forms Editor> Protected Fields**

The 'Include' flag can now be changed on some of the Protected fields, allowing them to be hidden on Mobile Forms. For example, you can now reduce the number of emergency contacts from 3 to 1, making your New Starter forms more compact.



## Mobile

### **SMG-1846 Mobile Imports> Filter Option**

Mobiles > P. View Received Data

A new 'Filter' button has been added to the screen to allow users to apply data ranges on certain fields.

### **SMG-1843 Mobiles> Send Site Budgets**

When sending Site budgets to mobile devices it was possible for a 0kb file to be generated and transferred, causing issues in the CL Mobile App. This file is no longer created.

## Payroll

### **SMG-1644 Payslips> Tax Prefix and Suffix**

There was an issue on payslips where it was possible for an employee's previous tax code prefix or suffix to be shown, even though their current code did not have one.

### **SMG-1787 Sites> Freeports**

Sites can now be tagged as Freeports. This special indicator will be used to populate address fields in FPS submissions for employees working in Freeports.

### **SMG-1813 Excel Timesheets> Non-Paid Holiday Absence Type**

The standard Excel spreadsheet format now recognises the letter 'O' as a Non-Paid Holiday, and will be imported as such into the pay cycle.

### **SMG-1819 Pay Item Code Report**

The Pay Items report now accommodates more characters from the Notes field.

### **SMG-1839 Pay Cycle> Browse Calc Screen Display**

The title on the Browse Calculation screen now uses the correct colour when in Calc mode

### **SMG-1803 Pay Cycle> Calculation**

For those lucky enough to receive a bonus of £1,000,000 or more, the system was not correctly calculating the amount of tax due. This has been fixed.

### **SMG-1817 Workplace Pension> TPP Pension Extract**

The TPP Pension extract now correctly reports employees over the SPA.

### **SMG-1818 Fixed Pay Employees> Bank Holidays & Holidays**

There was an issue when calculating pay for Bank holidays and Holidays for employees on fixed rates of pay, meaning no value was being paid where applicable, and the Holiday Days Taken weren't being updated accordingly. This has been fixed.

**SMG-1825 Mobile Timesheets> Offset Monthly Cycles**

In some scenarios, the hours for the last week of an offset monthly pay cycle were not being correctly displayed in Mobile Timesheets. These are now correct.

**SMG-1857 Workplace Pension> NEST Pension Extract**

Employees who have voluntarily terminated their membership of Nest Pensions are no longer included in the extract.

## Quality Control

**SMG-1798 QC Report**

The Sites Not Visited report in Quality Control was not always showing the correct date and time of the last visit to a location. This has been fixed.

## Sites

**SMG-1812 Actual Site Margin Report> Costs vs Budget Report.**

There was an issue with the CSV output of this report being poorly formatted. This has been fixed.

## Staff

**SMG-1800 Site> Regular Pay> TUPE tag**

The TUPE flag has been restored in the Site> Regular Pay screen.

**SMG-1810 Staff> NI Class Letter**

Validation has been added to ensure that employees born after 5 April 1961 cannot have an NI Class of B, E, I or T.

**SMG-1852 Staff> GDPR Compliance Manager**

Combo boxes in the GDPR wizard were displaying "3 months4 months" as a single option. This display issue in the GDPR wizard has been resolved.

**SMG-1858 Staff> Locking**

Unnecessary database locks were occasionally being created when adding new staff. Changes to the Staff screen will prevent these from happening in future.

### **SMG-1783 Statutory Paternity Pay (SPP)**

When adding SPP, if the end date of a period of absence was manually entered the entitlement could be lost. This should no longer be an issue.

## **Stock**

### **SMG-1799 Stock> Import Stock Issues from a Supplier**

In Stock > L. Import Stock Issues from a Supplier, a new 'Supplier Code' field has been added to the options screen. This allows you to specify the supplier code that will be applied to the imported records, and should match one of your existing suppliers.

### **SMG-1863 Machinery Report**

The CSV format of the Machinery Report (found in the Reports tab) now includes Site Name and Address details.

## **Time and Attendance**

### **SMG-1826 T&A> Site Manager Staff CSV Export**

The CSV format of staff details from Site Manager now includes employee NI numbers.

### **SMG-1840 T&A> Interface Setups Button**

There is a new 'Setup Interfaces' button in the Pay> Time and Attendance Processing menu. This is the same screen that can be accessed from the company setups screen, but this helps to reduce clicks to access it. This button will only be enabled for users who have the 'Company Setups' right.

## **Worksheets**

### **SMG-1815 Worksheets> Reconcile Contractors Invoices to Worksheets> Notes section**

A new 'Internal Comments' tab has been added to some of the Worksheet screens, allowing notes to be recorded against an individual Worksheet. These notes can also be seen underneath the table of Worksheets in Worksheet > C. Reconcile Contractor Invoice to Worksheets, showing the notes related to the parked Worksheet.

## **General**

### **SMG-1842 Login> Company Selection**

An issue with user rights not being properly recognised for Companies 10 and above has been fixed.



## [CleanLink Site Manager Previous Versions](#)

### *CleanLink Site Manager 2025*

#### **NEW FEATURES**

##### **Statutory Release 2025/26**

This release of Site Manager includes all of the updated rates and thresholds for the 2025/26 tax year.

##### **Statutory Neonatal Care Pay & Leave (SNCP)**

A new statutory payment has been introduced in this tax year (2025-26). Statutory Neonatal Care Pay & Leave is for employees with newborn babies who are admitted into neonatal care. This new form of pay can be entered via the Statutory payments tab in the Staff screen.

##### **Preventing entry of Employer Charges on Attachments**

It is now possible to prevent values from being entered into the Employer Charge field on Staff Attachments, to avoid inadvertently pushing employees below the National Minimum Wage.

In Setups > Setups & Defaults, in the Setups tab, is a new field called 'Allow Emp Chg on Attachments'. By default this will be set to Yes, but if switched to No the Employer Charge field in the Staff > Attachments tab will be disabled.

#### **Clients**

##### **SMG-1050 Client Special Prices**

The 'Add' button in this screen is working again.

##### **SMG-1675 Printing Work Patterns**

There is a new PDF print option for Work Patterns

##### **SMG-1686 Client/Site Overview Report**

This Client/Site overview report has been added to the Reports tab, under Clients, and is called Site Overview.

##### **SMG-1693 Credit Control Report**

In the printed and PDF versions of the report, values in the millions were being truncated. This has been fixed.

**SMG-1696 House Report**

The House Report has been added to the main Reports tab, under Clients.

**SMG-1740 Xero Invoice Export**

In the Xero invoice export, special characters were being removed from client names. However, Xero allows special characters (unlike Sage) and by removing them clients were not being recognised and were being added as new accounts. Special characters are now retained in client names when being exported to Xero.

**SMG-1748 Maintain Site Regular Pay**

An unwanted database lock was occurring while maintaining regular pay for sites. This is no longer a problem.

**SMG-1755 Jump To Sites**

If a user who did not have amendment rights tried the right mouse > Jump to Sites option, they would not be able to move between tabs. This is fixed.

**SMG-1757 Work Pattern Import Template**

The 'View Template' button in Clients> G. Work Patterns was opening the wrong template. This has been fixed.

**SMG-1761 Credit Control Report > Colour Coding**

A new 'Colour Overdue Transactions' option has been added to the Credit Control report, allowing you to choose the style of colour coding shown on the printed report. 'Yes' uses the new bolder colour scheme, 'Original' switches back to the previous scheme, and 'No' switches it off.

**SMG-488 Credit Control Report > Termination Date**

In certain circumstances the site's Termination Date, if set, was not shown on the report. This issue has been fixed.

## **Invoicing**

**SMG-1340 Invoicing > invoice List**

In both the one-off and in-cycle invoice lists, the Our Reference and Your Reference fields have been split into their own columns. This allows both fields to be sorted and filtered independently.

## Mobile

### **SMG-1703      Mobile Forms > Second Signatures**

It is now possible to define a second signature on Advanced mobile forms and have both imported into Site Manager.

### **SMG-1765      Mobile Holidays > Day To Pay**

Holidays booked on mobiles for employees in monthly cycles would sometimes be given an incorrect Day To Pay when imported into the Staff Holiday Log. This has been fixed.

### **SMG-989      Relinking Mobile Devices**

A new button has been added to the Mobile tab to provide easy access to the Relinking video.

## Payroll

### **SMG-492      P35 Printing**

A picklist was missing on the Staff fields. This has been added.

### **SMG-972      Pay > Partial Calculations**

When running a partial calculation on a Director, the NI calculation could be different to that given when calculating all employees at once. This has been fixed.

### **SMG-1585      Pay > NT Code**

Where an employee had been given an NT tax code on a W1M1 basis, they should have had no further tax taken. However, the calculation was treating this as a cumulative tax code and deducting some tax. This has been fixed.

### **SMG-1606      PAYE Period Report > CSV Output**

Not all columns in the CSV output of this report were allowing negative values, which meant that subtotals were wrong. All fields have been checked to ensure they support negative values, where applicable.

### **SMG-1685      Pension Export**

When running the pension export, a blank screen might appear at the start of some formats. This no longer happens.

### **SMG-1704      Annualised Pay details**

The Annualised Pay pop up window, available within cycles, now includes details of Uplift of Additions/Deductions (where applicable).

### **SMG-1750      SMP with Student Loans**

Receiving only SMP stopped an employee's Student Loan from being updated when closing the cycle. This is fixed.

**SMG-1754 Staff Ids in High/Low Paid Report**

This report was not showing staff ID's correctly if they were longer than 5 characters. This has been fixed.

**SMG-1760 Pay Cycle > Reports**

On the Reports screen within a pay cycle, some buttons did not have rights applied to them to restrict use. Rights have now been added.

**SMG-1764 Pay > SPP**

The number of Weeks Paid on SPP records was not being updated when closing a pay cycle. This has been fixed.

**SMG-1768 Setups > NMW/NLW Rates**

In the NMW/NLW Rates screen, the Calculate button was not showing inconsistent results for school leavers, depending on which school year they turned 16. This has been fixed.

**SMG-1772 Annualised Pay Listing Report**

This report was repeating the first site's details when an employee had Annualised Pay on multiple sites. This has been fixed.

**SMG-1775 SSP Waiting Days**

The SSP calculation process was not looking back far enough to find waiting days at the start of a prolonged period of linked absences. It then added new waiting days to account for what it thought was missing. This has been fixed.

## **Quality Control**

**SMG-1119 Emailing Audits**

It was not possible to email an audit to a client that included the '/' character in their code. This has been fixed by removing the '/' character when deciding the filename for the resulting PDF.

**SMG-1700 QC Forms Report**

A new CSV option is available for the QC Forms report that lists questions and answers that were imported from the mobile.

## **Staff**

**SMG-1698      Holiday Log > Calculating Payment value**

The value of holiday pay to apply to an absence was automatically calculated when you tabbed into the Day To Pay field. To prevent accidentally populating this value this no longer happens, and a Calculate button has been added to the bottom of the screen.

**SMG-1719      Holiday Clear Down to Portal**

Running the Holiday Clear Down procedure will now trigger an update of holiday figures in the Portal (where applicable).

**SMG-1769      Qualifications Report**

This report included leavers who had been redacted through GDPR. This is no longer the case.

**SMG-1771      Starters/Leavers Report**

The CSV format of this report could be corrupted by carriage returns in Notes. This has been fixed.

## **Stock**

**SMG-1238      Stock > Outstanding Orders Report**

The Supplier Name has been added to the CSV output of this report.

**SMG-1285      Issue Stock To Sites**

It was possible for a session to become locked when the first item of a Site Stock list was a non-issued item. These are now excluded from the view.

## **Time & Attendance**

**SMG-1441      Changing Site Names**

Changing just a site name now triggers an update to the T&A system

**SMG-1722      Sending Staff to Ezitracker**

When sending leaving staff to Ezitracker via Staff> 'Send to T&A' button, the system now marks the employee as INACTIVE if the leave date is today or a past date. Future dates will still be considered as ACTIVE.

## **Worksheets**

**SMG-1741      Worksheet Cycle End Dates**

Worksheet cycles 5 through to 9 were using the incorrect end date when opening a cycle period. This was affecting which worksheets were loaded into the period.

## **General**

### **SMG-1758 Divisions Maintenance**

On the Areas tab, the bottom section of the table was obscured by the Additions box.

## ***CleanLink Site Manager 2024 R2***

### **NEW FEATURES**

#### **Annualised Pay**

Annualised Pay is a major new feature that has been added to CleanLink Site Manager to facilitate customers who employ staff whose pay is spread equally across the year, even though they do not work all year. This accounts for certain types of contracts (e.g. educational establishments), which do not require regular shifts each week of the year.

The system has been designed to calculate annualised pay and holiday pay (where applicable) and to automatically calculate additions or deductions for employees who work more or less than their contracted hours during a pay period.

This comprehensive new functionality can be activated from the Pay Cycle setup screen but before you do that, you should read the Annualised Pay Guide, which can be found [here](#)

#### **Definable Properties**

This new feature allows you to define your own properties, or attributes, to be stored against Clients, Sites, Staff and Stock. For example, if you wanted to record the uniform sizes of your employees in the Staff screen you could define this as a property in the company setup. It would then appear in a new tab in the Staff screen. From there you could enter the values for future reference, print them in a report or even extract them to CSV.

To set up your own properties, go to **Setups > B. Setups & Defaults > Defaults tab > Misc tab** and click on the 'Property Sets' button.

### **Payroll**

#### **SMG-1490      TPP Pension Extract: State Pension Age**

An issue with the extract continuing to show previous Eligible jobholders as Eligible status after they have reached state pension age has been resolved.

#### **SMG-1509      Closed Sites: Update Pay Cycle**

Adding site closures can now update open pay cycles, although this will not affect cycles that are in Calculating status.

#### **SMG-1552      NEST Pensions Extract: Pensionable Pay**

This issue with pensionable pay has been resolved.

**SMG-1584      Payslip: Resizing of hours grid text.**

Some of the cells in weeks 3 and 4 of the payslip hours grid were not big enough to show double-digit hours. They are now slightly wider to accommodate the extra digit.

**SMG-1593      Rebuild Regular Pay: Updating Site Subtotals**

An issue with site subtotals in the rebuilds of Regular Pay has been found and resolved.

**SMG-1605      P60s – User Access**

The restrictions around who can print or email individual P60s have been tightened.

**SMG-1612      SSP Waiting Days**

Sometimes, when the waiting days at the start of a period of SSP spanned two calendar months, the system would incorrectly add an extra waiting day. This issue has been resolved.

**SMG-1616      SPP in Pay Cycle**

In some cases, the new SPP records were not being correctly added to the pay cycle. This is now fixed.

**SMG-1619      Portal Holidays: Day to Pay**

Portal holidays that spanned two or more pay periods could be given the wrong date to pay. This is now fixed.

**SMG-1630      Email Queue: Pay History**

There was an issue when emailing payslips via the Pay History screen when the email parameters were set to use the Email Queue. This is no longer a problem.

**SMG-1647      Payslip Email Address Display.**

A new setting has been added that allows payslips to display an alternative email address, different to the one they may have been sent from. This can be found in Setups> Payroll Cycles> Details button.

**SMG-1654      Hours Comparison Report: Duplicate Lines.**

The cause of duplicate lines has been found and fixed.

**SMG-1658      Pay Items: New facility to remove pay items for employees en-masse.**

A new utility has been added to remove a specific pay item from all, or a range of, staff. While useful in certain circumstances, this should be used with extreme care.

**SMG-1663      Portal Holidays: XMLs being rejected**

Certain punctuation characters were being included in XMLs being sent to the Portal, which was causing them to be rejected. These are now converted to their HTML equivalent before sending.

**SMG-1683      Portal Holidays: Removal of Portal Holiday when deleted within Pay Cycle in Site Manager**

The Portal was not being updated when holidays were deleted in the payroll. This action now sends an update to the Portal.

**SMG-1684      Portal Holidays: Updating Portal during pay period close routine**

In some cases, staff were not being included in the holiday update sent to the Portal when closing a cycle. This has been resolved.

## Portal

**SMG-1508      Portal Holiday Requests: Changing Sites before Final Approval**

Changing the client/site on a Portal holiday request before it is imported now results in a DELETE instruction being sent to the Portal for the original request, followed by an ADD for the modified request when it is imported.

**SMG-1576      Portal Photos: Additional controls for sending photos to the Portal**

In order to reduce the volume of data and processing time of updating staff in the Portal, the system will now default to sending new images or those updated since the last time the transfer was run. There is an option to override this and send all images, if required.

## Mobile

**SMG-1560      Mobile Notifications.**

Some of the notifications for imported mobile forms were not being emailed. This has been fixed.

**SMG-1571      Portal & Mobile Holiday Requests: Auto-import option.**

It is now possible to automatically import absence requests coming from the Portal. To activate it, go to Mobile > S. Maintain Mobile Parameters > 'Receive' tab.

**SMG-1594      Mobile Import: Single User Process**

The import of mobile data files is now single-user. If a second user attempts to run it, they will be stopped and shown a message telling them who is currently using it. This is to prevent duplicated entries in the data holding area.

**SMG-1596      Mobile Forms: Removal of unnecessary Notes visible in Site QC tab.**

Site mobile forms which are NOT the default 'Site Review' (Form No. 2) will no longer include 'Reviewed with Position Reviewed By' in the Notes field in Site QC tab when imported.

**SMG-1610      Mobile Forms: Switching between Advanced and Basic Forms**

A warning message has been added when toggling a form between Advanced editor and the original layout, to highlight the potential for breaking forms waiting to come back from mobiles.

**SMG-1640      Mobile Forms: Advanced Form Editor**

It is now possible to search for lines by their ID, and these can be seen in a tooltip. Useful for debugging issues with Advanced Editor forms.

**SMG-1653      Mobile Forms: Original style forms.**

An issue with the Action Date being excluded from mobile forms when Clauses were in use has been resolved.

## **Sites**

**SMG-1494      Site Reports: Include Search Name to CSV Output.**

Geographical Areas Report and Client Listing Reports have been extended to include the site Search Name in their CSV output.

## **Staff**

**SMG-1604      SPP: Average Weekly Pay.**

There was an issue in the new Staff 'Paternity' pay tab that prevented you from entering a manual figure for the Average Weekly Pay. This has been fixed.

**SMG-1613      Jump to Staff from Pay Cycle**

It was possible to use the 'Jump to Staff' feature from a closed pay cycle and accidentally change some of the values in that cycle when closing the Jump To screen. This no longer happens.

**SMG-1631      Statutory Pay tab> functionality of 'New' button**

In the Staff Maternity pay tab, the 'New' button might not work if there was a previous maternity record. This button now works correctly.

**SMG-1632      Entry of SPBP.**

A problem with dates not being amendable in the Staff SPBP tab has been solved.

**SMG-1641      Staff Statutory tab functionality.**

It was possible for the Staff Statutory tab to get stuck in a state that prevented other tabs from being accessed without first exiting the staff screen. This is now fixed.

**SMG-1645 Printed Staff Mobile Forms.**

The word 'Witness' has been removed from the print following customer feedback.

**SMG-1646 Staff Regular Pay: Date Started on Site**

When adding a new job, the employee's Start Date at Site field will no longer default to today's date and will instead default to being blank. Validation has been added to the field to prevent the record from being saved without the user entering the date.

**SMG-1695 Staff Reviews: CSV Output.**

Incorrect Staff IDs in the CSV format of the report have been fixed.

## Stock

**SMG-1615 Stock Movement Report.**

The Stock Movement Report now includes fields for Client/Site name, Area Manager, and Supervisor, following customer feedback.

**SMG-1655 Mobile Stores Order: Special Prices**

Special prices are now picked up from the Site when manually adding an item to a stores order in the holding area, prior to import.

## Time and Attendance

**SMG-1519 Timegate CSV Import: Absences**

Absences are now marked as processed when imported in the pay cycle.

**SMG-1626 T&A CSV: Unmatched Pay Rate Transactions**

An issue with unmatched pay rates relating to rates 2 and 3 has been fixed.

**SMG-1639 T&A Import into Pay Cycle: Site Not Previously in Cycle.**

Contracted hours are now included when importing a site from T&A that wasn't already in a pay cycle.

## Worksheets

### **SMG-1470      Regular Worksheet Report**

The number of the mobile device to which worksheets have been allocated is now shown on the Regular Worksheet Report.

## Invoicing

### **SMG-1588      Xero Export**

An issue with the Site Name being output in the email address column has been resolved.

### **SMG-1627      Credit Control Report: Subtotals**

The Credit Control report now includes subtotals for the recently added aged debt summary.

### **SMG-1633      Invoicing> View Stock to be Posted**

All of the data columns in this screen are now sortable.

## Quality Control

### **SMG-1475      Auto Import Audits: New Option**

A new option has been added to the Mobile Parameters screen that allows you to set an average score percentage over which audits will be automatically imported from the holding area. Audits failing to reach that threshold will be left in the holding area for manual review.

### **SMG-1476      Mobile Notifications**

A new option has been added to site Mobile Notifications that allows you to decide if an imported audit is automatically emailed, based on its average score percentage.

### **SMG-1602      QC Marking System. QC Marks Sheet Format default getting reset inappropriately**

An issue with saving the changes made to the marking system within company setups has been resolved.

**SMG-1608      QC Audit Format: New Format Available**

A new Audit format is now available that can show company logos, and uses subtler colours when presenting audit scores. The new format can be activated by going to Setups> B. Setups & Defaults> Formats tab> Quality Control> 'Audit Print'> 'Logo'.

**SMG-1620      Site QC: Select Areas**

Inactive areas are no longer included in the count of site audit points.

## General

**SMG-1507      Email Parameters: Email Source**

It is no longer possible to change the name of email sources.

**SMG-1542      Company Name Bar: Allow users to select colour for each company**

The colour of the company name bar that appears at the bottom of the Site Manager screen can now be chosen. Go to Setups > Setups & Defaults> Company Logo section on left> 'Colour' field and choose from a range of colours.

**SMG-1581      BCC Emails sent from Site Manager**

It is possible to configure all emails sent from Site Manager to be BCC'd to a single email address of your choosing. If you require this functionality, please contact the Support team to discuss how this can be configured.

## **CleanLink Site Manager 2024**

### **Payroll**

#### **SMG-1521 2024/25 Statutory Release**

This release of Site Manager includes all of the updated rates and thresholds for the 2024/25 tax year.

#### **SMG-1537 Allow Apprenticeship Levy Allowance to be overridden**

The Apprenticeship Levy Allowance figure can now be overridden with a value that will be retained when new Statutory values are issued with Site Manager.

Go to Setups > R. PAYE, NI & Staff Setups > L. NI Parameters > Apprenticeship Levy tab. Tick the 'Enable Override' box and enter your required value.

Please note that this figure will never be changed by future Site Manager releases. If the Apprenticeship Levy Allowance is changed by HMRC in the future you will need to manually adjust your override value.

#### **SMG-1555 SSP Diary NOT adding required waiting days to new absence period**

An issue with the SSP calendar was preventing waiting days from being added to some new absence periods. This has been fixed.

### **Portal**

#### **SMG-1536 Staff with only 'Contract' set in GDPR are not sent to the Portal**

Staff who had only been given the 'Contract' setting as their legal basis for GDPR were not being uploaded to the Portal, when they should have been included. This has been fixed.

### **Sites**

#### **SMG-1495 CSV Format of Site Address Report to wrap the whole data field in double quotes.**

The Site Address Report now wraps text columns in double quotes to prevent commas in address data from corrupting the layout in Excel.

### **SMG-1535 CSV Client subtotals on Actual Site Margin report**

A new Client subtotal line has been added to the CSV output of the Actual Site Margin report. This will assist in analysing the data in Excel.

## **Staff**

### **SMG-1533 New Site DBS Report includes staff that the user should not be able to access.**

The new Site DBS Report was including staff records that the user did not have access to see.

### **SMG-1534 New DBS Administrator right for DBS reports**

Previously, the new DBS reports required you to have payroll access to the pay cycle employees were on. This has been extended to include a new 'DBS Administrator' right which allows a user to run these reports even if they don't have payroll access.

### **SMG-1543 Portal Holiday updates not including adjustment days**

In some cases, holiday adjustment days were not being sent to the portal along with other updated holiday information. This has been fixed.

## **Stock**

### **SMG-1236 Add supplier name column in Stock > I. Create Purchase Order**

The Supplier Name has been added as a new column on this screen. This will help with filtering of data.

## **Time and Attendance**

### **SMG-1531 Stop CSV T&A import from creating blank transaction records**

If a CSV transactions file was uploaded that contained blank lines, it would result in blank T&A transactions being created in the holding area. While blank lines should never be included in the CSV file, we cannot completely ignore them (there may be data after the blank lines) but the T&A holding area will no longer be filled with blanks.

## Worksheets

### **SMG-1540 Add Job Type to one-off work sheets and reports**

A Job Type field has been added to one-off worksheets, working in the same way as for regular worksheets. It has also been added as an optional filter to the worksheet reports.

### **SMG-1559 Improvements to Worksheets**

A new date sequence has been added to the worksheets file, allowing options B, C and D in the Worksheets menu to list their records in descending date sequence. This will present newer items first and push the oldest to the bottom of the list.

## Invoicing

### **SMG-1557 Add address fields to Xero export**

The export of invoices to Xero Now includes client address and postcode details, to allow Xero to distinguish between clients with the same trading name.

### **SMG1562 Improvements to Credit Control Report**

Various improvements have been made to this report including: making the invoice date filter a from/to range, the overdue date filter a range, adding an optional site number filter, a new Days Overdue column, and various additions to the CSV output.

### **SMG-1564 Add Aged Debt summary to Credit Control report**

A new optional section has been added to the Credit Control report. This presents a summary of your clients' aged debt, placing outstanding invoice values into groups according to the age of the debt.

## Quality Control

### **SMG-1558 Limit Audit Points per Site**

A limit of 2,000 audit points per site has been introduced to prevent excessively large audits from causing performance problems on mobile devices.

## General

**SMG-1230 Enable different Reports folders per company**

You can now direct a company's report files to be written to its own folder on the server. Go to Setups > Setups & Defaults and click on the Defaults > Misc tab. Here you will find a field in which you can enter your preferred folder path. Please ensure that this folder is accessible to anyone who will be running reports for this company.

**SMG-1504 Allow more than 9 companies**

It is now possible to use more than 9 companies in a single Site Manager installation. Please contact the Support team for assistance with setting up additional companies.

## ***CleanLink Site Manager 2023 R4***

### **Payroll**

#### **SMG-1513 National Insurance changes for January 2024**

In response to the recent Autumn Statement, we are deploying the latest National Insurance rates as detailed by the Chancellor of the Exchequer. These revised rates take effect from January 6th 2024.

### **Sites**

#### **SMG-1489 Quick filters in Invoice History**

In the Sites >Invoice History screen, new tabs have been added to the top to allow for quick filtering. You can easily switch between looking at all invoices and credits, invoices only, credits only, or outstanding items only.

### **Staff**

#### **SMG-1512 Copy Existing Staff button**

In the last Site Manager release, the Copy Existing button had been disabled on the Staff screen. This is now working again as it used to.

## ***CleanLink Site Manager 2023 R3***

### **Staff**

#### **SMG-1345 Names in Staff Holidays report**

The site name and staff name have been added to the CSV output of the summary option of the Staff Holidays Report.

#### **SMG-1448 Pension Opt Out tab sometimes disappears**

A bug in the Pensions Opt Out tab of the Staff screen occasionally prevented it from appearing. This has been fixed.

#### **SMG-1453 Deleting Staff Attachments**

It was possible to delete a staff attachment if there was a related posting in an in-progress pay cycle. This is no longer allowed.

#### **SMG-1454 Stop amendments of default descriptions for Religion, Gender, Sexuality picklists**

It was possible to amend the "Unspecified / do not use" descriptions on the Religion, Gender and Sexuality pick lists. These are now protected fields to prevent confusion and accidental changes.

#### **SMG-1455 P11 Report Headings**

The text shown on the heading of column 1 has been changed to more accurately reflect the data in that column.

#### **SMG-1465 Spurious waiting days in SSP Diary**

In certain circumstances the SSP Diary was showing additional waiting days on a continuous absence when pressing the Calculate button. This no longer happens.

#### **SMG-1466 Improvements to Staff Attachments report**

The selection ranges on this report have been improved to offer more flexibility.

### **SMG-1467 DBS Fields in T&A Staff Export**

Recent changes to the DBS functionality led to an unwanted change in format in the T&A Staff CSV export. These columns have been moved back into their previous positions in the layout.

### **SMG-1468 Staff screen truncating surnames**

The Staff screen was truncating surnames at just 20 characters. This has been fixed and the surname length is now back to its original limit of 30 characters.

### **SMG-1474 Changing Pay Cycles in the Staff screen**

It was possible to change an employee's cycle even when the 'from' cycle was in-progress or calculating. This should not have been possible and is no longer allowed.

## **Payroll**

### **SMG-1351 Portal Holiday Requests**

New functionality has been added to Site Manager to support the new Employee Holiday Requests feature in the CleanLink Portal which is due for release in the near future.

### **SMG-1459 'DBS Required' indicator missing**

When looking at pay details in a cycle via the Pay By Staff option, the site's DBS Required indicator was not showing, but it is shown when looking at the same details from the Pay By Site screen. This has been added to Pay By Staff.

### **SMG-1472 Regular Pay Rebuild**

Further changes have been made to improve the rebuild of regular pay to prevent it causing issues when other users are accessing the data files.

## Sites

### **SMG-1458 Add Latitude and Longitude to Sites**

It is now possible to specify the latitude and longitude for a site record. Pressing F5 when values are present will open a map of the chosen location.

### **SMG-902 Add What3Words reference to Sites**

It is now possible to specify a What3Words reference for a site record. Pressing F5 when an address is present will open a map of the chosen location.

## Mobile

### **SMG-1291 Sort Codes on new employees**

There was an issue where sort codes being received from mobile new starter forms were being created incorrectly if the record was imported without first viewing the data in the View/Modify screen. In this situation additional dashes were being included in the sort code which were unnecessary, this has been resolved by removing unnecessary dashes from sort codes in future.

### **SMG-1464 Holiday requests in Mobiles > View Imported Data**

In the View Received Data screen of the Mobile tab, you can now see the client, site, data and approval status of holiday requests without having to open up the Detail window. This will make it easier to manage holiday requests before importing them.

### **SMG-1477 Jobs not being created for new staff from mobiles**

If a new staff record was received from a mobile device, and the job definition contained pay rates but no hours, the final import into the Staff screen was not creating a job record. This has been fixed so that if only a pay rate is entered on the mobile, a job definition will still be created that uses the specified pay rate(s).

## Quality Control

### **SMG-1473 Quality Control > Report Visits**

The Start, End and Elapsed Audit time and regular visit frequency have been added to the Quality Control > Report Visits CSV extract

## Stock

### **SMG-1452 Adding products to External Stock Orders**

When adding stock to an External Stock Order, if the product you were selecting did not have a Depot associated with it, you could not add it to the current order. This has been fixed.

## General

### **SMG-1461 Error with Multi-Send emails**

An error message complaining about an improperly formatted address would appear when trying to use the Multi-Send email facility. This error check was not necessary and has been fixed.

### **SMG-1463 Totals on Asset Usage & Costs report**

The totals shown at the end of this report have been re-aligned to properly reflect the columns in the report.

## ***CleanLink Site Manager 2023 R2***

### **Important New Features**

#### **SMG-1390 Staff DBS Enhancements**

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

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

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

#### **SMG-1287      Emailing in parallel to improve user experience**

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

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

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

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

## Staff

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

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

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

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

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

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

### **SMG-1420 New security badge format 'D'**

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

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

### **SMG-1442 Add Manager to Staff Report**

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

## Payroll

### **SMG-1342 Holiday Accruals For Leavers**

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

### **SMG-1379 DPS Notifications**

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

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

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

**SMG-1406 Introduce auto-extend feature to SSP diary**

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

**SMG-1407 Linked PIWs in the SSP Calendar**

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

**SMG-1408 Amendment log for SSP diary**

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

**SMG-1409 Site T&A Reference No**

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

**SMG-1417 Holiday pay incorrect for Fixed staff**

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

**SMG-1418 Include total paid hours on Payslips**

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

**SMG-1419 Payslip Email Message**

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

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

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

## **Invoicing**

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

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

### **SMG-1447 Change default invoice number range in Batch Print**

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

## **Portal**

### **SMG-1434 Sending data to the Portal**

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

### **SMG-1307 Portal Staff Surnames**

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

## **Quality Control**

### **SMG-1403 Illegal characters in QC Audit PDF filenames**

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

## Stock

### **SMG-1103 'Stock not Invoiced' Report**

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

### **SMG-1416 Delivery Note Printing quotes the incorrect site name**

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

## Worksheets

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

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

## General

### **SMG-1451 Printing Site Actions**

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

## ***CleanLink Site Manager 2023.1***

### ***Payroll***

#### **SMG-1386 Pence not allowed in Directors' FPS submissions**

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

#### **SMG-1306 Column names in regular pay export**

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

#### **SMG-1352 BACS Templates**

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

#### **SMG-1373 Display of Tax Month in payroll calendar**

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

#### **SMG-1381 Rebuild Regular Pay**

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

#### **SMG-1385 NMW School Leavers**

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

#### **SMG-1389 SSP Qualifying Days**

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

### *Time and Attendance*

#### **SMG-1376 CSV Site Export**

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

#### **SMG-1377 CSV Staff Export**

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

#### **SMG-1382 T&A Reference for new Clients**

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

### *Mobile*

#### **SMG-1348 Sort Codes from Mobiles**

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

#### **SMG-1387 Hazard descriptions being truncated**

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

## *Staff*

### **SMG-1372 Email validation**

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

## *Stock*

### **SMG-1276 Search on product descriptions in purchase orders**

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

## *Invoicing*

### **SMG-1346 Database locking**

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

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

### **SMG-1347 Correct Posting button**

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

## *Quality Control*

### **SMG-1333 Include in QC indicator**

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

## **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 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 has a navigation menu at the top with options: Home, Clients, Staff, Stock, Invoicing, Pay, WorkSheet, Quality Ctrl, Mobile, Contacts, Query, Reports, Setups, and Warnings. The current view is 'Site Maintenance' for site '12345678'. The interface is divided into several sections:

- Left Panel:** A list of sites with columns for Client Code, Site No, and Search Name. The first site, 12345678, is selected.
- Top Tabs:** Address, Site Info (active), Notes, Closed, QC, Emergency, Documents, RA.
- Main Content Area:**
  - Site Info:** Site Active? (checked), 11/03/20, Issue Warning? (unchecked). Division [F5]: 01 Cleaning. Area Manager [F5]: 01 WATSON, H, Mrs. Supervisor [F5]: (empty). Default Invoice Cycle [F5]: 1 Monthly DOC. Start Date: 11/03/20. Contract Renewal Date: (empty), Warn: 3 Months Beforehand. Termination Date: 31/05/21, Termination Reason: End of Term. Last Increase: (empty). Note: This date is only used if the item dates are not set.
  - Geographic Area [F5]:** (empty)
  - Cleaning Time:** (empty)
  - Days Cleaned:** 5. Works Bank Hols? (unchecked), Wks Worked: 0.00. Days of the week: Mon (checked), Tue (checked), Wed (checked), Thu (checked), Fri (checked), Sat (unchecked), Sun (unchecked).
  - Site Category:** A gold. Fix Category? (checked).
  - Stores Depot [F5]:** A. TUPE Site? (checked). Lone Worker Site? (checked). DBS Required? (checked). Payslips Required? (unchecked). Blank Paysheet Req? (unchecked) (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.
- Bottom Panel:** A grid of buttons for various actions: 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, OK & Exit.
- Footer:** 'How do I...' search bar, 'F1 Holdings' label, 'Reset Screens' button, 'Runtime: SiteManager', 'Query', 'WIDE', 'INS'.

## *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"/>		!

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.

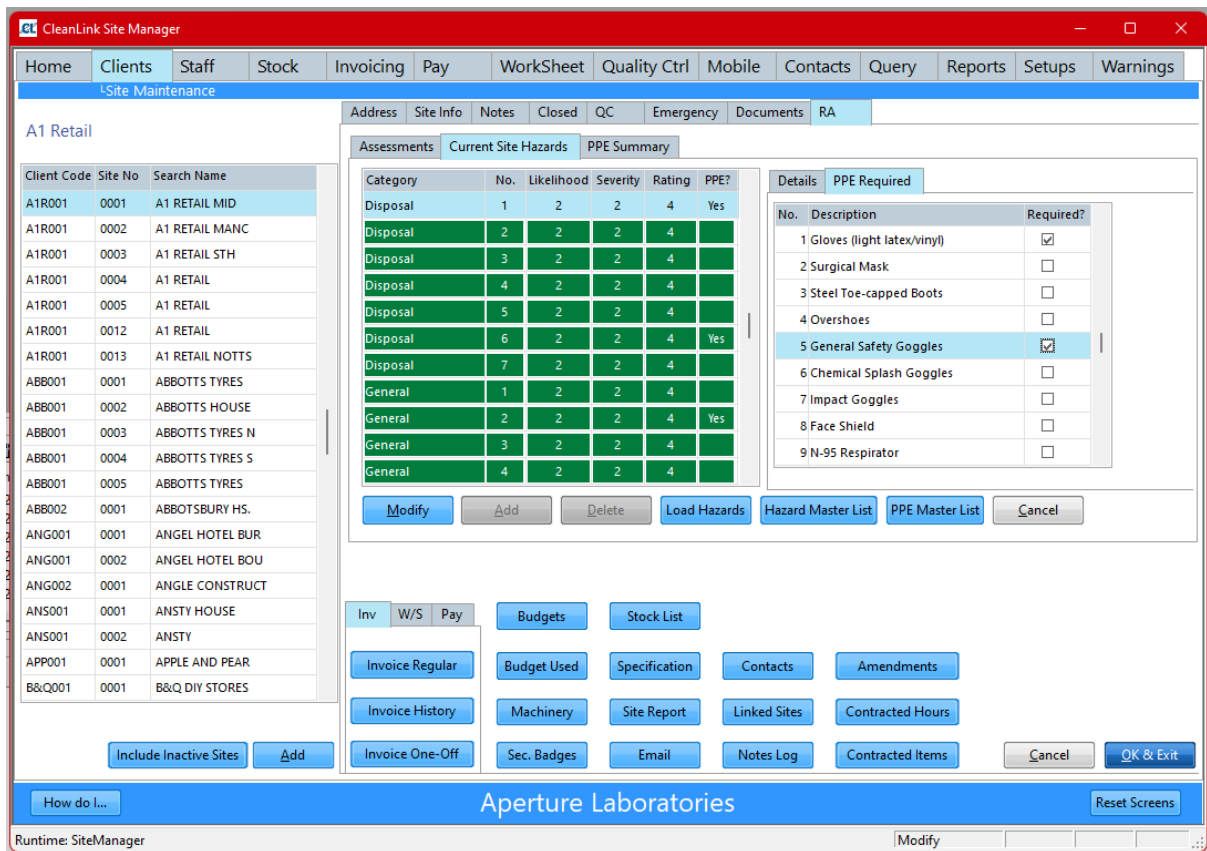
Full details of how the Advanced Forms Editor functionality works can be found in the CleanLink Site Manager Advanced Forms Editor document found in the CleanLink> Crib Sheets folder.

**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**

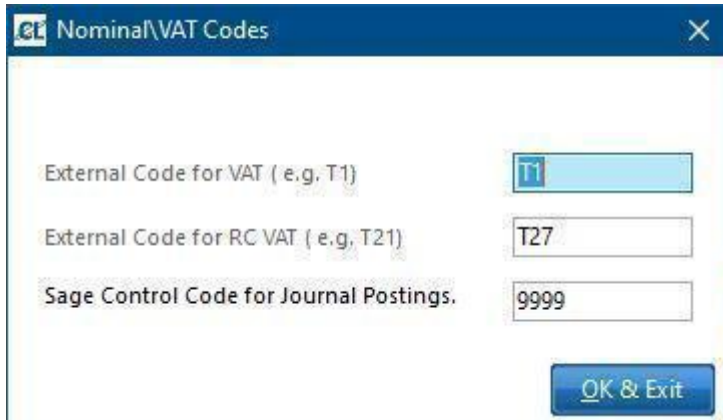
**Invoice/Credit List Report:** Include text lines - When produced in CSV format with 'Include Invoice Details' field selected, the Invoice/Credit List report, accessed via **Invoicing tab> C. Invoice/Credit List Report**, now includes text lines.

**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.