



CleanLink Site Manager Changes for V5.04.039

Changes

- 1) QC Detailed Audit Report** - The option to select a form type has been added.
- 2) Backups** – When using the option that allows you to choose which files to backup, the previous option that allowed automatic selections of files 'Modified from this date' has been improved – it is now 'Modified since date & time'. This option defaults to the date & time of the last backup which makes it easy to do a backup of everything that has changed since the last backup was done.

Fixes

- 1) Mobiles** - New Staff Import - The payslip delivery method is now set to the system default when creating the staff record.
- 2) Timesheets** - Exports to Spreadsheet - Multi-tab. The problem with the odd tab not being correctly named has been fixed.
- 3) QC Report Visits** - The problem with not selecting a single form type has been fixed.
- 4) QC Export to mobiles** - The problems with the audit items disappearing on the mobile has been fixed. This fix has resulted in the temporary removal of the 'send latest site information' option. If you normally select this, it would be better to use the 'send all' option on the mobile menu before exporting the Audits.
- 5) Payslips** – Previously, if someone with a Student loan also had an Attachment of earnings order, the student loan could appear twice on the A4 payslips type. This has been fixed.

6) Pensions – Opt outs / Opt ins: Previously, if someone who had opted out of a workplace pension was subsequently opted back in again, the system would not respond automatically to the newer opting back in request. This has been fixed.

7) Backups – Previously, any changes to the backup location that were made via this screen were not retained. This has been fixed.

CleanLink Site Manager Changes for V5.04.038

NOTE – HMRC has started to issue NI codes with a KC prefix. This is a new code. You will need to add this to your NI Prefix table. This can be done by selecting >Setups, >19.Payee, NI & Staff Setups. >NI Prefixes. To add a record you will need to enter Ctrl M, then F4 to add. Enter KC then Exit.

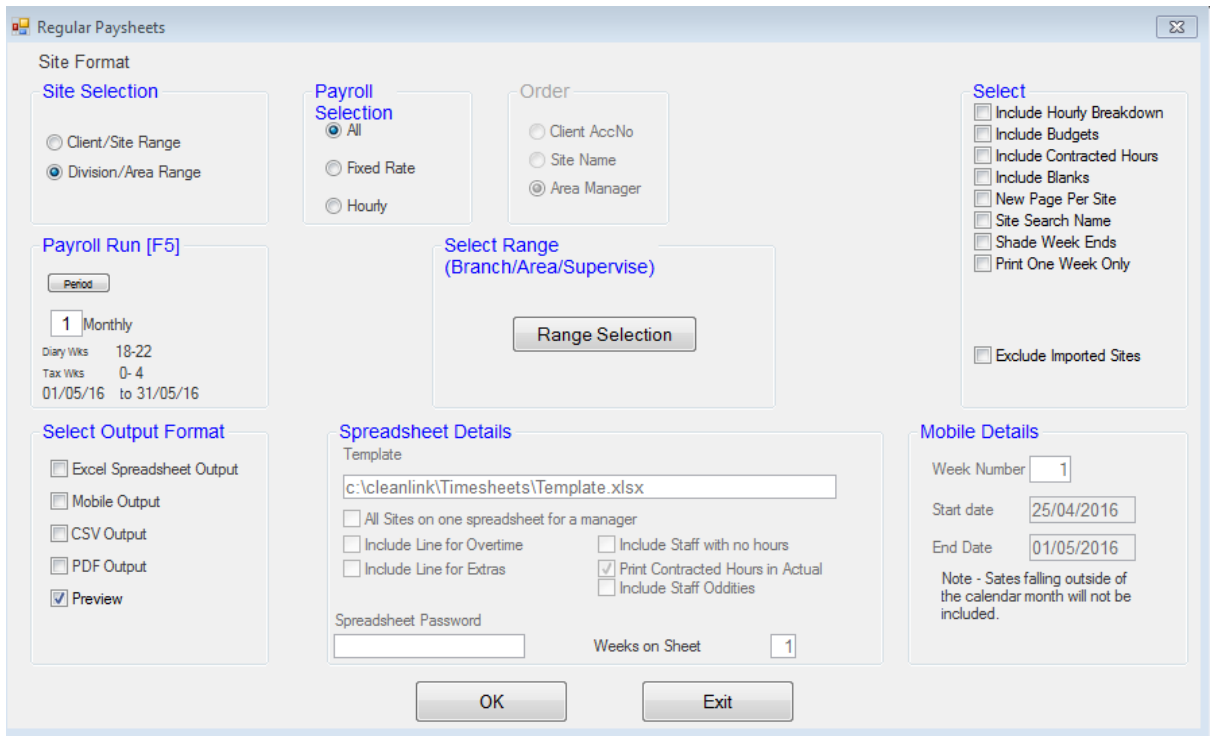
Changes

1) Invoice Production – The In Cycle invoicing has been modified to allow staged invoicing within a cycle. Invoices can be marked as hold and released in stages. For more information see the [F1] help, Invoice, Regular Invoicing, Invoicing in Stages section).

2) EPS Report – a new report that can be found on the Pay, In year movements menu. This report will list the data transfer to HMRC for the selected tax year.

3) Multi-page Spreadsheet Timesheets – The spreadsheet timesheet export/import programs have been modified to allow all sites for an area manager to be in one spreadsheet as different books. The option to name the books (or individual spreadsheets) by site search name as opposed to site number has been added. There are no visible changes to the import routine to process this format of spreadsheet.

4) Mobile Timesheets (out) – The creation of the XML's sent to the mobiles has been added to the Regular Timesheets program. This is initiated by selecting mobile export on the new layout for this program.



As each week is sent separately to a mobile you will also need to select the week you want to send. For monthly sheets this can be between 1 and 6, for weekly sheets it is limited to the number of weeks in the cycle.

Before using this you will need to mark the pay items you want to be available on the mobile. This is done using Setups, Payroll Cycle, Pay items and has to be done for each cycle. **NOTE there is only one pay item file held on the mobile which is not pay cycle dependant. Therefore it is necessary to ensure that the items you want available are common across all pay cycles.**

5) Mobile Timesheets (in) – Timesheets from mobiles are transferred using the same process as other information from the mobiles. To import them into Site Manager it is necessary to use the 'Received Data' option on the mobile menu. Once imported the timesheets will not be viewable from this screen. To view them you will need to select either the 'Timesheets Processing' option on the Pay menu or if you are also using the Ezi-tracker interface the view data option on the Ezi-tracker menu. More information on this process can be found at

6) Forms to Portal – A new field has been added to the forms screen if the portal is available. This allows specific form to be directed to different folders on the Portal. If the field is blank the forms will go to the Audit folder as present.

Code	Description	Destination (0=Site, 1=Staff)	Portal Destination Folder
1	New Staff	1	
2	Site review	0	
3	Staff Review	1	
4	Job Induction & Training	1	
5	Photo Testing	0	Folder 1
7	Selection Photo	0	Folder 2

Exit Modify Add Delete Question Clauses Send Form

7) Pensions – Cyclical Automatic re-enrolment. You must re-enrol eligible jobholders into an automatic enrolment pension scheme if they're not already active members of one, every three years after your staging date.

Cleanlink will now automatically re-assess this for you and if necessary, re-enrol those workers meeting the eligible jobholder criteria, back into pension saving. More details on Cyclical Automatic re-enrolment and employers' duties can be found [here](#).

To ensure Cleanlink operates according to your needs, you should review the following 2 screens and make adjustments as necessary:

1st – Verify that the next cyclical automatic re-enrolment date is entered correctly: See...

Setups -> 18. PAYE, NI & Staff Setups -> Workplace Pensions Parameters

2nd – Decide whether you wish to auto re-enrol workers back into the original scheme that they were previously in, or whether to use the current default scheme for the worker’s cycle:

CL Workplace Pensions (Global) Parameters

Staging Date

Next cyclical automatic re-enrolment date

For re-enrolment, use the original pension scheme instead of the current default for the worker's cycle?

Use DB/Hybrid Transitional Period? End of DB Transition

Effective From
06/04/2013

Employee's Contribution % Employer's Contribution % Total Contribution %

Next Cyclical Automatic Re-enrolment Date

The first step for cyclical re-enrolment is to choose a cyclical automatic re-enrolment date. This is the date an employer needs to assess whether to re-enrol certain workers.

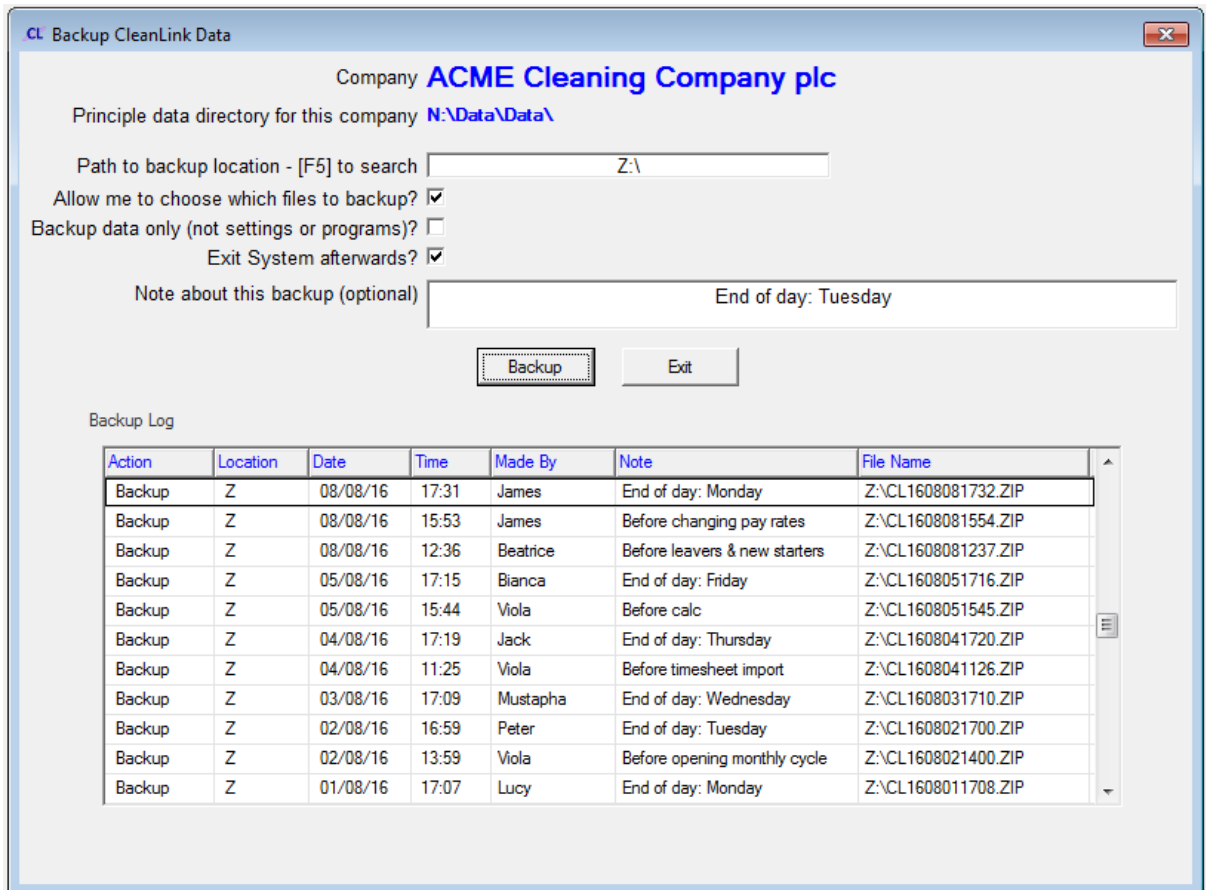
The employer can choose only one cyclical automatic re-enrolment date for the assessment of their workers. This date must fall within three calendar months before or three calendar months after the third anniversary of the employer's staging date.

3rd - Decide whether or not you wish to auto re-enrol workers who have only ceased being members within the last 12 months: See...

Setups -> 18. PAYE, NI & Staff Setups -> Pension Schemes -> Schemes

Payroll, Calendar Year & Period, the computer user's username together with the date and time of file creation.

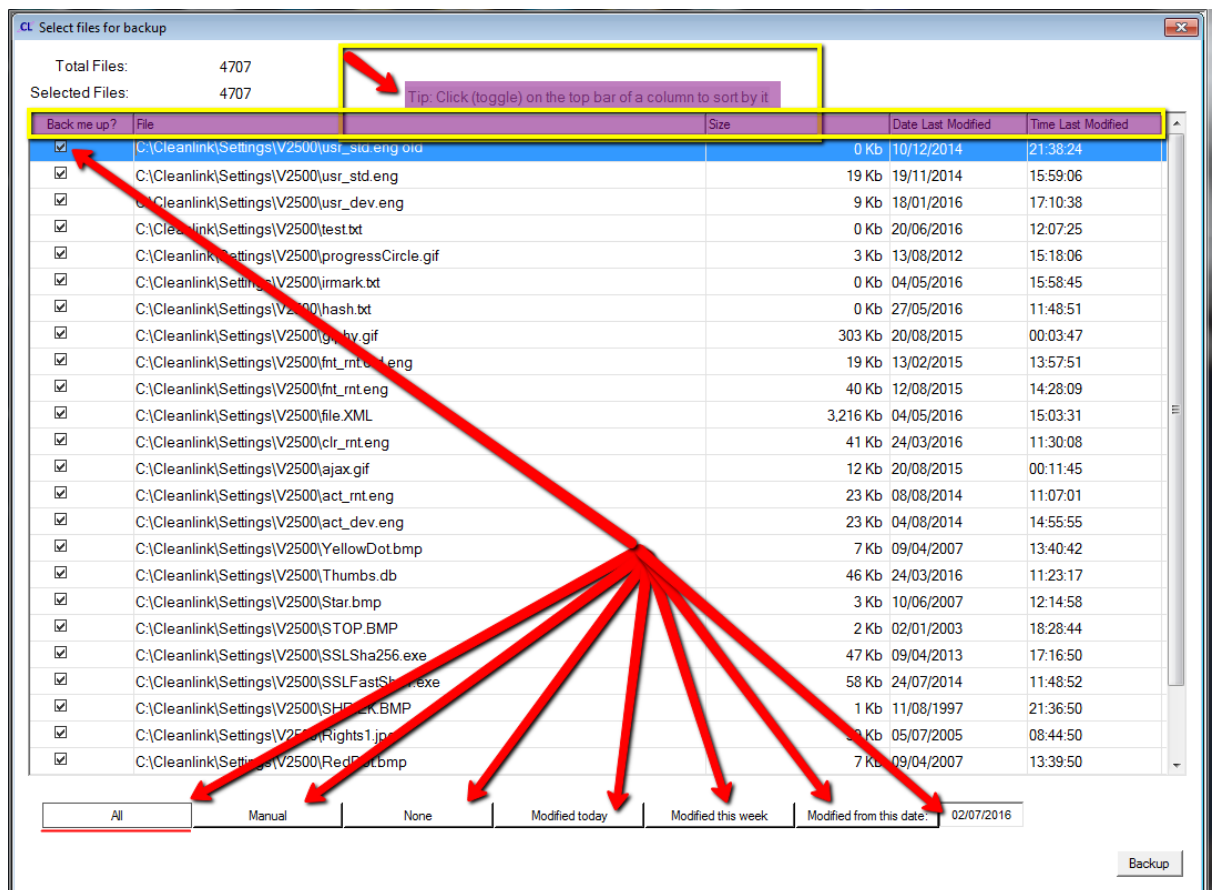
- 9) Browse Calculation Screen** – This has been modified to show Salary Sacrifice.
- 10) PAYE Period Report** – This has been modified to show Salary Sacrifice.
- 11) Staff Report** – This has been modified to include a Tax Regime option.
- 12) Staff Update from Mobile** – This process has been modified to include changes to bank details received from mobiles. **Note - if the fields are blank the existing staff data is not over written, therefore if you do not want to apply certain changes sent from a mobile, clear those fields.**
- 13) Reset Pay Cycle** – The option to delete holidays for the period being reset has been added. This is particularly useful when electronic timesheets are in use.
- 14) Backups** – The interface has been revamped to enable better control over what specifically is backed-up (including whether or not to back up static settings & the Cleanlink program itself) and to (optionally) exit the system after a backup has completed.



New options include:

Allow me to choose which files to backup?

Selecting this option will bring up the following screen when you press the Backup button:



Each column is sortable (by clicking on it). It works as a toggle, so each click will alternate the sort from (say) lowest-to-highest or highest-to-lowest.

The buttons on the bottom are to enable easy selections. A red line shown underneath a button is there to make it clear which choice is currently in use.

All: This will 'tick' all of the files so they are selected for backup

Manual: If you change any of the ticked boxes yourself, this button will become active – denoting that you are manually choosing which files are to be backed up. Note, pressing this button in itself does not make any changes to the files previously checked for backup, but again, it denotes that manual changes may be made.

None: This will uncheck everything. Very handy if you want to have a clean slate before making some subsequent manual selections. Use this in conjunction with the sortable columns to help you find what you wish to backup.

Modified today: This will auto-select only those files that have been changed today. Note, you may need to toggle on the 'Back me

up' column after using this button, so that the files selected appear at the top of the list.

Modified this week: This will auto-select only those files that have been changed in the last 7 days. Note, you may need to toggle on the 'Back me up' column after using this button, so that the files selected appear at the top of the list.

Modified from this date: This will auto-select only those files that have been changed from the date shown to the right. You can change this date as required, and your choice will affect the display immediately after you move off the date field. Note, you may need to toggle on the 'Back me up' column after using this button / date field, so that the files selected appear at the top of the list.

These new features will allow you to introduce a smarter & faster backup strategy / regime into your regular processes by enabling you to more easily implement full, incremental & differential policies for backups should you wish to do so. Please note however that Cleanlink will perform the backup according to your choices but it does not 'know' what your strategy is and thus it is still for the users to annotate and store their backups in a way that is meaningful, such that restores can be carried out in a sensible way.

Finally, support has also been added to enable backups to be carried out on 32 bit as well as 64 bit versions of Microsoft™ Windows™ operating systems. Please note however, that 32 bit systems are more limited than 64 bit systems in their ability to handle very large files so you should take this into account and avoid using 32 bit systems if you believe your data volumes may mean you are affected by such limits. More information on this can be found [here](#)

Fixes

- 1) NIable pay / Taxable pay** – Previously, if someone with a non-workplace, non-qualifying pension scheme was subsequently opted out of workplace pensions (to prevent them paying into both schemes), then - in the period that any opt-out refund was determined, the NIable pay was set (in that period alone), to be the same value as the Taxable pay. If the remaining pension deduction was of a type that reduced gross pay before tax (giving tax relief on

the contributions), then the effect would be to also give NI relief on that period's contributions too, resulting in a reduced NI contribution in that period.

- 2) Pensions** – Better warnings when adding someone to a pension to avoid some common errors regarding TUPE'd workers.
- 3) Pensions** – Periodic Member Enrolment extract files (e.g. NEST_ME.csv file). Previously, workers who were TUPE'd into the pension scheme (Contractual enrolment rather than Auto-enrolment) – these workers were being output to the Member Enrolment (ME) file each period instead of just once in the period that they were Contractually enrolled. This has been fixed.
- 4) Pensions** – Periodic Contributions files (e.g. NEST_CS.csv). Previously, leavers could be repeatedly output to the file rather than just once (for the period that they left in). This has been fixed.
- 5) Pensions** – The problem with Salary Sacrificed contributions not reducing Gross Pay upon calculation has been fixed.
- 6) Mobile Forms** – The problem with the photo's being duplicated has been fixed.
- 7) Student Loans** – The problem with the stop date being ignored on student loans has been fixed
- 8) Staff Reviews** – View Details has been amended to allow parking on comments and the use of F6 to display long comments
- 9) Payslips** – The problem whereby the Net Pay shown on the A4 printed payslip was incorrect when pension deductions were taken from Gross Pay has been fixed.
- 10) Holidays Taken Report** – The problem with the accrued figure not including any brought forward balance has been fixed.

Additional release notifications for v5.04.038

Pensions: Previous Opt-Outs & re-enrolment.

In accord with updated guidance from the Pensions Regulator (available [here](#)), we have changed the way that Opt-Outs are assessed to provide better assurance that they are 'Valid' Opt-Outs.

The relevant section of the updated guidance is copied below for your convenience.

“

When a jobholder can opt out

10. Before a jobholder can choose to opt out of pension scheme membership, they must:
 - have become an active member of the pension scheme under the automatic enrolment or opt-in provisions, and
 - have been given the enrolment information from their employer.
11. The latter is important to ensure the jobholder will have been provided with sufficient information about the effect of the enrolment, so they can make an informed choice about whether to opt out.

”

To ensure better compliance with this guidance, Cleanlink Site Manager will no longer allow previous Opt-Outs (or otherwise 'ended' pensions) to continue to prevent automatic enrolment into a workplace pension, where such opt-outs or ended pensions were effected solely via an 'Assessment' record. This is because these records are not indicative of any actual active membership of any 'real' pension scheme.

The effect of this change will be that some previously opted-out workers or workers who have otherwise ended their pension savings, will become enrolled (because Cleanlink Site Manager has no valid record of them ever opting-out or otherwise ending their membership of a 'real' scheme).

If – following enrolment, such workers subsequently wish to genuinely Opt-Out or otherwise end their pension saving, they may of course do so - by following the prescribed methods as notified to them when they actually achieve active membership of the scheme.

* Important: Data take-on situations

Please note: If you have enrolled sections of your workforce into workplace pensions in a past data take on situation, then there may be situations where Cleanlink Site Manager will only have an 'Assessment' record to denote those workers who opted out of pensions (perhaps before you were even using Cleanlink Site Manager) – and, as explained above, such Opt-Outs will no longer be valid.

In most cases the number of workers affected is likely to be quite small and the best option may be to simply accept that they may become enrolled again - particularly if you are already nearing your 3 yearly cyclical automatic re-enrolment date which involves a mandatory re-enrolment of opted-out workers in any case; but if you are unsure or require further assistance, please contact support in the usual way.

CleanLink Site Manager Changes for V5.04.037.2

Changes

- 1. Attachments - Attachment Types** – Following the addition of the 'Banded' attachment a further attachment has been added. This is called a DWP type. The difference between this and a variable payment is that a variable payment deducts 50% of the upper band whereas the DWP payment upper band deducts a percentage of the whole earnings.
- 2. Stock Report** – The option to create a CSV file for the Un-invoiced report has been added.
- 3. PAYE Period Report** – The alternating line shading introduced in v5.04.037 to enable easier reading across the rows of this report, has been made *optional* as per each logged-in user's pc. The shading has also been slightly lightened to aid legibility.
- 4. Payslips** – The A4 printed payslip has been amended to display Taxable & NI-able gross pay values.

Fixes

- 1. Student Loans** – The occasional problem with student loans being incorrectly deducted has been fixed.

- 2. Timesheet Import** – The problem with Absences not being added has been fixed
- 3. Staff Check** – This no longer reports on in-active sites
- 4. Pensions** – The YTD values were not reset at the commencement of the 2016/17 tax year. This has been fixed and the YTD's recalculated.
- 5. EPS** – The problem with some Cycles' periods not being included in the correct HMRC period has been resolved.
- 6. GPS** – The problem whereby the Google map was not showing the labelling of the mobile users and was defaulting to a London location rather than the actual location of the mobile has been resolved.

CleanLink Site Manager Changes for V5.04.037.1

Fixes

- 1) PAYE/NI Tables** – For multi-company installations, these tables should have been copied to each company, but sometimes were not. This has been fixed.

NOTE – When updating to this version the 5 tables are copied to each company as set in the parameter files. The old ones are renamed by appending 2015.1 to the end, for example SPARAMS2015.1

This is in case you have your tables set differently in any of your other companies, in which case their old versions will not be lost.

- 2) NI Tables** – The parameters for weekly ST and PT earnings thresholds may have become transposed. This has been fixed.

Changes

- 1) PAYE Period Report** – The alternating line shading introduced in v5.04.037 to enable easier reading across the rows of this report, has been slightly lightened to aid printed legibility.

CleanLink Site Manager Changes for V5.04.037

Changes

1) Attachments

- a) **Attachment Types** – A new type, “Banded” has been added. The details of how a typical one of these should be set up is in Appendix 1, and is also shown in the Site Manager User Guide.
- b) **Attachment End date** – A new field has been added “End date” if this is set then the deduction of the attachment, regardless of the outstanding payment, will be stopped.
- c) **Employers Attachment Fee** – The option to add an attachment fee has been added.
- d) **Pay to Nominal Codes** – An extra default has been added for the Employers Attachment Fees.

- 2) **PAYE/NI Tables** – These have been updated for 2016 including the addition of a Scottish rate table and the second student loan.

NOTE – When updating to this version the 5 tables are copied to each company as set in the parameter files. The old ones are renamed by appending 2015 to the end, for example SPARAMS2015. This is in case you have your tables set differently in any of your Companies.

- 3) **Workplace Pensions Thresholds Tables** – These have been updated for 2016. Please note, it is likely that you will need to amend the “Effective From” dates for each Pay Frequency that applies to you, to properly reflect the Start Date of the corresponding Pay Cycle(s). Please refer to the ‘Cleanlink Payroll Year End 2015-2016’ document for details.
- 4) **Workplace Pensions NMW/NLW values** – For those Staff whose Workplace Pension contributions are deducted under a Salary Sacrifice arrangement, the new NLW rate for workers 25 and over will be used from 1/4/16 along with the new Tax Regime setting (rather than the postcode as previous), to determine the suitability or otherwise of using Salary Sacrifice.

5) Student Loan – Student Loan Plan 2 has been added. This is activated by selecting Attachment code 98. Note as the P45 does not include a plan type this needs to be manually set when creating staff. (See HMRC website <https://www.gov.uk/new-employee/student-loans> as a starting point or <https://www.gov.uk/government/publications/payee-starter-checklist>).

6) Time Sheets – Standard Excel Format

a) Creation – When creating Excel Spreadsheets two extra tick boxes have been added: Include Line for Overtime and Include Line for Extras. Only one of these can be selected. The affect is that an extra line is allowed for each staff record. The correct template must be used for these selections.

b) Import – There are several extra features been added to this:

i) Include Overtime – When selected the extra line containing overtime pay rate and hours is imported.

ii) Include Extras – When selected the extras payment codes and value are imported from the time sheet. Note if the payment code is not found and message is added to the log file.

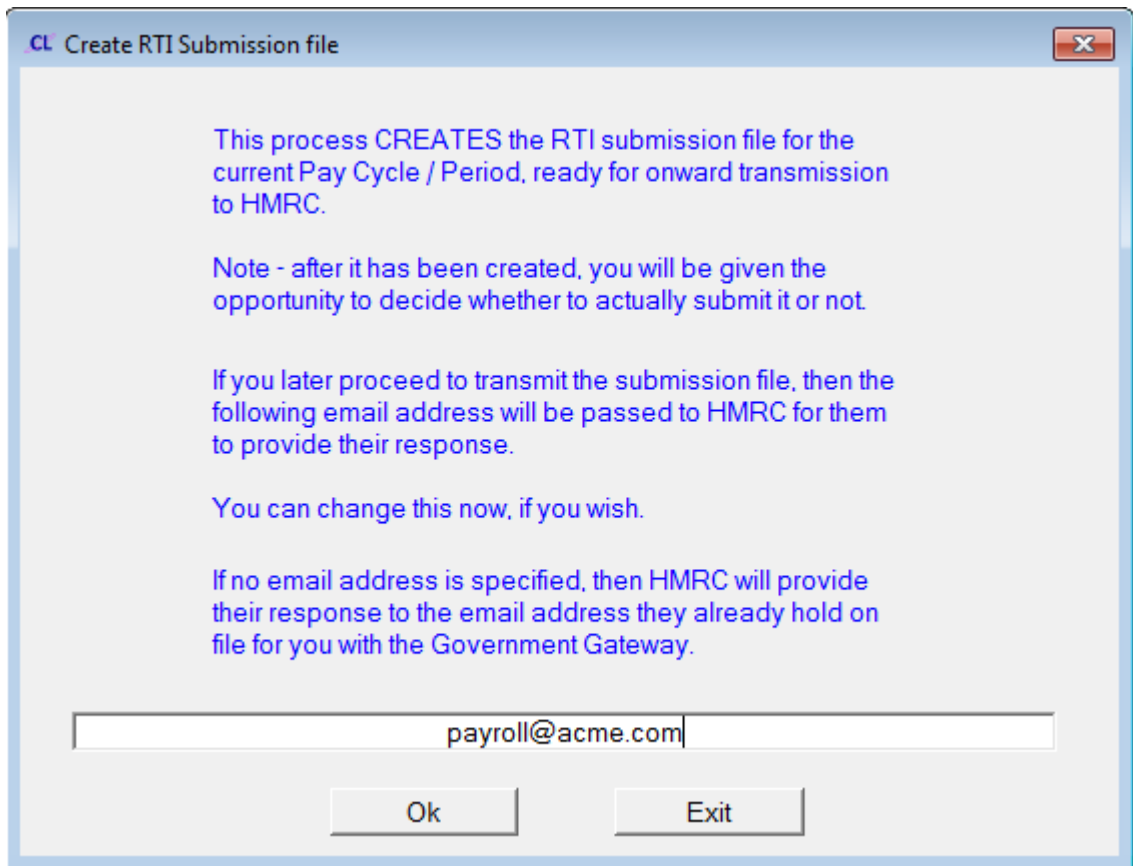
iii) Pay Holidays when not enough Accrued – When selected holidays entered on the time sheet are paid regardless of how much has been accrued. A message is added to the log file if there was insufficient accrued.

iv) Absence records – If an absence record already exists for a date entered on the time sheet, no action is taken other than to record this in the log.

7) Reports – Several reports have had extra selection options or fields added to the CSV export. These are:

a) Ezi-tracker Report – The option to sort into site or staff order has been added.

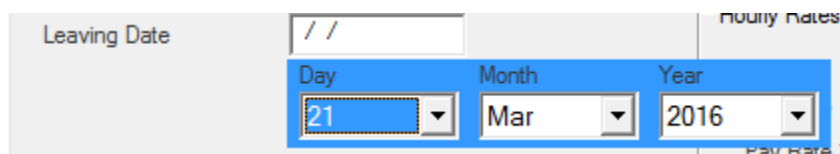
- b) Client Listing** – The email address has been added to the CSV export.
 - c) Site Address Report** – The email address has been added to the CSV export.
 - d) Hours Paid Report** – The Client and Site have been added to the CSV export.
 - e) Outstanding Orders Report** – The supplier code and description have been added to the CSV export.
 - f) Bradford Factor Report** – The Area and site codes have been added to the CSV export.
 - g) Period PAYE Report** – This has been amended to display and use Gross, Taxable Gross and NIable Gross values to reduce the incidence of flagging of false imbalances, for instance where Employee Pensions contributions are deducted from Taxable Gross.
- 8) Invoicing** – Manual addresses – When adding a manual address the option to copy either the client or site address has been added. If this is a multi-site Invoice then a prompt to select the site is issued.
- 9) Regular Pay Rebuild** – This has been modified to re-create the hours worked from the Regular Hours screen for hourly paid staff. For fixed paid staff the hours are set to those manually entered on the record.
- 10) Staff; SMP** – If a leaving date has been entered, it is now possible to remove it, providing the number of payments made does not equal the number due. A warning is issued when removing this date that further payments may be made.
- 11) Pay; RTI PS Transfer** – It is now possible to specify an alternative email address for HMRC's reply to your submission.



Fixes

- 1) Staff; Leaving Date** – Previously, when using the F5 key to zoom to the Calendar, an endless loop would occur. This has been fixed.

Also, a new date picking control has been introduced both here and for the **Start Date & Date of Birth** to make it easier to choose dates within normal ranges.



- 2) Staff; Adding Staff, Cancel button** – Previously, when adding new staff, if the Cancel button was pressed it would result in an endless loop. This has been fixed.

Effect of Earnings Arrears

An earnings arrears has the general effect of requiring the employer of a debtor:-
 (1) to deduct a sum calculated in accordance with the Debtor (Scotland) Act 1987 from the debtor's net earnings on every pay-day; and
 (2) to pay sum so deducted to the creditor as soon as it is reasonably practicable.
 The arrears remains in effect until the debt has been paid or otherwise extinguished, the debtor has ceased to be employed by the employer or the arrears has been recalled or abandoned by the creditor or has ceased to have effect.

Deductions to be made under Earnings Arrears

SCHEDULE regulation 2(b)

TABLE A: DEDUCTIONS FROM WEEKLY EARNINGS

<i>Net Earnings</i>	<i>Deductions*</i>
Not exceeding £106.17	Nil
Exceeding £106.17 but not exceeding £383.74	£4 or 19% of earnings exceeding £106.17, whichever is the greater
Exceeding £383.74 but not exceeding £576.92	£52.74 plus 23% of earnings exceeding £383.74
Exceeding £576.92	£97.17 plus 50% of earnings exceeding £576.92

TABLE B: DEDUCTIONS FROM MONTHLY EARNINGS

<i>Net Earnings</i>	<i>Deductions*</i>
Not exceeding £460.06	Nil
Exceeding £460.06 but not exceeding £1,662.88	£15 or 19% of earnings exceeding £460.06, whichever is the greater
Exceeding £1,662.88 but not exceeding £2,500	£228.54 plus 23% of earnings exceeding £1,662.88
Exceeding £2,500	£421.07 plus 50% of earnings exceeding £2,500

TABLE C: DEDUCTIONS FROM DAILY EARNINGS

<i>Net Earnings</i>	<i>Deductions*</i>
Not exceeding £15.12	Nil
Exceeding £15.12 but not exceeding £54.68	£0.50 or 19% of earnings exceeding £15.12, whichever is the greater
Exceeding £54.68 but not exceeding £82.19	£7.52 plus 23% of earnings exceeding £54.68
Exceeding £82.19	£13.84 plus 50% of earnings exceeding £82.19

* When applying a percentage the calculation should be done to two decimal places of a penny and the result rounded to the nearest whole penny, with an exact half penny being rounded down.

Instructions to Employer

Please read these instructions carefully.

- When this earnings arrears is served on you, you are required to make a deduction from your employee's earnings on every pay-day unless you are already making deductions from his earnings under a previous earnings arrears or a conjoined arrears order in which case read section 59 and 62 of the Debtors (Scotland) Act 1987.
- (1) You must begin deducting on the first pay-day occurring after a period of seven days after the date of service of this schedule on you.
 (2) Where another pay-day occurs within this seven day period you are entitled but not required to begin deducting.
- The sum to be deducted is calculated in accordance with section 49 of the Debtors (Scotland) Act 1987. A copy of section 49 (1) to (6) and section 49A and schedule 2 to the Act is attached.
- As soon as reasonably practicable you must pay the sum deducted to: **Stirling Park, Collections Department, PO Box 26023, 16 Nelson Street, Kilmarnock, KA1 2YE, Telephone No. 01563 545818**
- You must continue to make deductions and payments until:-
 (1) the debt recoverable has been paid or otherwise extinguished;
 (2) the debtor has ceased to be employed by you or
 (3) the arrears has been recalled or abandoned by the creditor or has for any other reason ceased to have effect.
- You are entitled to charge your employee a fee (at present £1.00) on each occasion you make a payment to the creditor.
- For further information read the following notes.

Notes

- The debt recoverable by the arrears consists of the sums as set out in section 48 of the Act.
- "Earnings" and "net earnings" from which deductions are to be made, are defined in section 73 of the Act as amended by the Child Support Act 1991.
- You are referred to the following sections of the Act:-
 50(1) Sheriff's powers on the application by the debtor or the person on whom the earnings arrears schedule was served to make an order declaring that the earnings arrears is invalid or has ceased to have effect.
 50(3) Sheriff's power on an application by the debtor, the creditor or the employer to determine any dispute as to the operation of an earnings arrears.
 57(1) Employer's liability where he fails to comply with an earnings arrears.
 58(1) Provisions regarding the simultaneous operation of one earnings arrears and one current maintenance arrears.
 59(1) While an earnings arrears is in effect, no other earnings arrears against the earnings of the same debtor payable by the same employer is competent.
 59(4) Employer's duty, on receipt of a second earnings arrears schedule to give certain information to the "second creditor".
 62(2 and 3) Employer's duty, when a conjoined arrears order is in effect, to give certain information to a creditor who is not included in the conjoined arrears order and who has served in effect an earnings arrears.
 69(3) If deductions are not made on the first pay-day after the service of the earnings arrears schedule, in accordance with section 69(2) of the Act, deductions made on a subsequent pay-day are not to include any deductions in respect of the first pay-day.
 69(5)(a): Intimations to the employer may expect to receive from the creditor or the sheriff clerk.
 70(4a): Employer's duty to intimate a copy of an earnings arrears schedule to the debtor and to give certain information to the debtor.
 70A: Employer's duty to give certain information to the creditor or, as the case may be, the sheriff clerk and to send a copy of certain information to the debtor.



CleanLink Site Manager Changes for V5.04.036.5

Fixes

- 1) Staff / Leaver / Pensions**– Previously, when a leaver in the current cycle was also being paid, their past pension contributions were being refunded in error. This has been stopped.
- 2) Staff / Leaving Date** – Previously, when using the F5 key to bring up the calendar / date picker – upon selecting a date you could be trapped in an endless loop. This has been fixed.
- 3) Staff / Cancel** – Previously, when adding a new person, pressing the Cancel button could cause an error message to persistently pop up (e.g. requiring the Start Date to be populated). This verification trap is inappropriate when Cancelling and so has been removed.
- 4) Staff / Pay Cycle change** – When adding a new person, the Pay Cycle is initially set according to the Company Default. Previously, if the defaulted Cycle was not in 'Required' or 'Closed' mode, the system would prevent you from changing the Pay Cycle. This verification trap has been removed.
- 5) Mobiles / Importing New Staff** – The problem with the displaying and processing of staff questions/documents has been resolved.

CleanLink Site Manager Changes for V5.04.036

Changes

- 1) Client/Site Company names** – If these are amended after the record is created a prompt is issued to confirm the validity of the change. This is to prevent these fields being inadvertently changed.
- 2) Site Audit Report** – The photo section of this report has been modified to include the location, area and description above the photo.

3) Staff – Please note that the layout and placement of controls on this screen has changed a little to enable easier validation of the data being entered. For instance, you now have the Date of Birth before the NI Category which is useful because the choice of NI Category is itself dependent on the date of birth.

4) Staff Country/Region – A new choice box has been added to allow you to specify a person's Country/Region. This setting is used to determine the jurisdictional Tax Basis for a person so that their pay calculations from April 2016 onwards are made under the appropriate tax regime and also to enable appropriate validations of other entries (such as NI Categories) to be made.

IMPORTANT – Upon upgrading to version 5.04.036, the **Country/Region** setting will be defaulted for **all** Staff to **Éire** if the external Accounts Package is set to **Sage Micropay**. Otherwise it will be set to one of the regions within the United Kingdom of Great Britain and Northern Ireland based on Staff postcodes, with England being the default when a postcode is unknown or not present.

A report will automatically be output to the Reports folder called '**Staff Country-Regions.csv**'. You should check this report and make changes to the Country/Region setting for any Staff as you deem necessary, since the Country/Region setting will determine the basis for calculation of UK PAYE from the 2016/17 tax year onwards.

Staff No.	Name	Stat
00089	BROWN Joan	Emp
00090	BROWN Jane	Emp
00091	BROWN Jimmy	Emp
00092	SMITHSON Bob	Emp
00093	BROWN Janice	Emp
00094	JONES Jack	Emp

Country/Region: England

Payroll (F5): 1 Staff Monthly

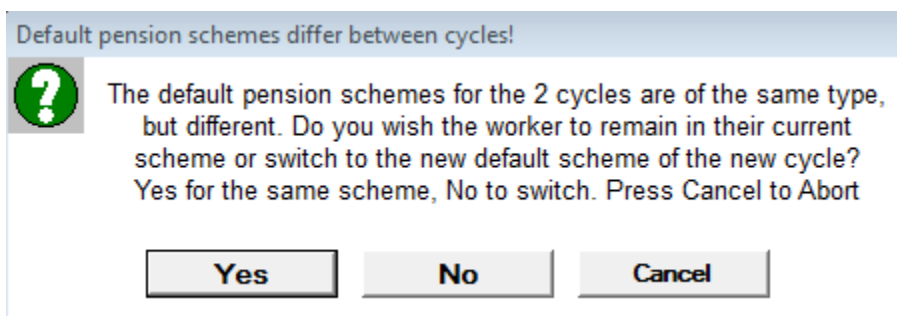
Date of Birth: 01/01/1960 (56Yrs 0Mths 17Days)

Table Class (NI Cat) [F5]: A

5) Staff, Pay Cycle change – When changing someone's Pay Cycle, Cleanlink will now check that the Cycle they are moving **From** is either in 'Required' or 'Completed' mode before allowing the change

to occur. This is to prevent people being moved whilst they may be in an inconsistent state.

Also, if a Staff member has any **Pensions**, these will now be automatically transferred to the new Cycle too. If a pension being moved is of the same **Type** as that of the **Default Pension Scheme** specified for the **new** Cycle, but is actually for a **different** scheme, then the user will be prompted to choose whether to transfer the worker - complete with their original/existing scheme - or to automatically transfer them to the Default Scheme pertaining to the Cycle being moved into.




6) Staff, Pension - TUPE Transfer – A new button is now available on the Staff/Pension tab for use when you have a Staff member that has joined you under a Transfer of Undertakings (Protection of Employment) arrangement and you need to enter them into pension immediately because they were previously in a pension with their previous employer.

Name	Tax	Bank	Previous/Loan	Info	Holidays	Quals & Docs	Pension	Maternity Pay	Attachments	Starter Info
------	-----	------	---------------	------	----------	--------------	---------	---------------	-------------	--------------

Manually add a Worker to a Pension Scheme

Pension Company

Scheme



If the pension being added is of a Workplace **Type**, the person will be added without postponement as a 'contractual enrolment, bypassing the usual need to either first have triggered for auto-enrolment or to have opted-in before contributions can be taken.

Please note, the '**Add Pension (TUPE)**' button is only **enabled** when the 'Original Employment Start Date' is populated and is earlier than the 'Start Date' of the new Staff member.

7) Staff, Pension, TPP Extract – This has been modified to prevent an opt-out with a populated opt-out reference and a refund being output to the file.

8) Invoice Analysis Report – This has been modified when selecting by division to only include the part of the multi-site invoices that is linked to the selected division.

9) Unpaid Invoices report – The option to sort this report by date as well as client has been added. When sorting by date any un-allocated cash will appear at the end of the report.

10) Invoice Posting – It is now not possible to post a batch of invoices without an invoice date.

- 11) Invoice Exports** – Factored. The option to export only factored clients has been added. Factored clients are those with an entry in the factored code field.
- 12) Payslip Formats** – A new format has been added 'Plain paper A5' designed so that the address fits an A5 envelope, otherwise the same format as standard Plain Paper.
- 13) BACS format** – A new format for Bacsway has been added.
- 14) Regular Paysheets** – Excel Format. The option to include staff oddities in the comments has been added.
- 15) Paysheet Import** – From Spreadsheet now picks up any site notes, added in Cell C6, and includes these on the import log.
- 16) P45's** – These can now be emailed to staff with an email address on their record.
- 17) Priority Attachments** – The problem with priority attachments back dating the deduction from when they were entered (as opposed to their start date) has been fixed.
- 18) Living Wage** – An option to report/update over 25's to the living wage has been added to the Staff & Sites Pay Rates option. Currently this should be run from April 2016 to convert current staff. Ideally this should then be run before each pay cycle to detect staff reaching 25 within the cycle.
- 19) Period Pensions Report** – When outputting data for Workplace Pensions, this report will now output the value of 'Qualifying Earnings' which is what the contributions are based upon rather than 'Pensionable Gross'.
- 20) Worksheets** – 3 new fields have been added, 'Signed by', 'Signed on' and 'Name'. If the worksheet is received from a mobile these are automatically updated. These can be manually entered for non-mobile worksheets.
- 21) Detailed QC Report** – These can now be emailed to sites.

22) Emergency Notes from mobiles – When the emergency details are modified on a mobile and sent to base, providing they are approved the site record is updated.

23) Displaying GPS Data – The Link to Google Maps has been modified to work with the latest version of Google maps. Please note, that in the absence of any actual GPS coordinates to plot, the default location upon displaying a map is centred on London.

24) Backups – A new version of the backup program has been introduced to overcome the problems with large file sizes (> 2Gb).

25) Machine report – This has been modified to display the last entry in the machines notes log where currently the short machine note appeared.

CleanLink Site Manager Changes for V5.04.035

New Features

1) Transfers to Portal/Mobiles – Two new flags have been added to the Site record, Exclude from Mobile and Exclude from Portal. By default sites are included but ticking these flags can force their exclusion.

2) Site Termination Reason – A new field has been added to the site file: Termination reason. This is selected from a drop down list either when the site is made in-active or a termination date entered. The Reason(s) are setup/maintained via

Setups -> 29. Termination reason.

Here it is also possible to set a flag to force entry of a reason when a site is terminated/made in-active.

- 3) Site Start/Stops Report** – This has been modified to optionally include/select a termination reason. Note if this option is selected the margin is not printed on the report.
- 4) Cash Receiving** – A new option has been added to import a CSV of cash receiving's exported from Sage.
- 5) Credit Control Report** – An option to print only the Credit Notes has been added.
- 6) Closed Site report** – A new selection option of Date Range has been added to this report.
- 7) Copy Templates to Sites** – A new import program has been added that allows the creation of audits from templates, the details being taken from a CSV file. The format of this file is shown on the report header, and is:

Client Code, Site Number, Location (max 15 characters), Area (max 15 characters) and Template Code (max 5 characters).
- 8) Staff Holidays to PDA** – A new parameter has been added to the mobile parameters, to control if holiday entitlements/Taken are sent to mobiles with the staff details.
- 9) Pay Item Code Report (in Cycle)** – This has had the option to range on Division, Area and Client added.
- 10) Timesheets, Spreadsheet format** – A new option to exclude the regular hours as actuals has been added.
- 11) Hours Paid Report** - the option to include over 25's only (in preparation for living wage), has been added.
- 12) Pay Anomalies Report** – An option to include zero hour contracts has been added to the staff not paid report.
- 13) Staff History Hours** When viewing the staff history hours any absences are displayed as in the current cycle.
- 14) Staff Starter Information Report** – Two further options have been added to this report: Personal Data (NI Code, DOB, Start date) and current Sites (Site Name, Pay cycle, total pay and total hours).
- 15) Pension Exports** – This has been modified to export pension data in a format acceptable by NOW pensions.

16) QC Visit Report – The option to select by Location has been added to this report.

17) QC Details Report – The option to export service visits as PDF's has been added.

18) Stores Order via mobiles – It is now possible to amend the delivery date before processing the incoming order.

19) Audits on Mobiles – An extra field 'Signed By' has been added. This gets carried through to the Site record.

Fixes/Adjustments for V5.04.035

- 1) Multi-Period P32 Report** – The default date range has been changed to be from the 6th of the current month to the 5th next month to fall in line with HMRC.

Note – Take care the 1st time you use this, that you do not miss any Cycles or include any twice if you have not been using this date range before.

- 2) Worksheet Cycles (Monthly)** – The process of opening a cycle has been amended to correctly allocate visits to days within the month. For instance, if in Regular Pay a job is set to be done on the first Monday and first Wednesday of the month and the first of the month is Tuesday these jobs will be allocated to Wednesday 2nd and Monday 7th.
- 3) View DPS Replies** – This has been modified to display the staff leaving date if they have left. Note these should be 'removed' once checked.
- 4) HMRC (DPS) importing** – When opening a pay cycle, the DPS updates that are automatically applied were previously done so in order of their Type and then their Effective Date (e.g. P6's, P9's, SL1's, SL2's). This has been changed so that the application of updates is now done in the order of their effective dates, irrespective of their type, to prevent situations where (say) an earlier P9 would nonetheless have otherwise overwritten a later P6.
- 5) Staff report, CSV Export** – Extra data, Hours worked at Site (first Site alphabetically if Staff work at more than 1 Site) and TUPE date have been added.
- 6) Staff Check Report** – This has been fixed to ignore leavers and also correctly check age related NI Codes.
- 7) EziTracker, Get Data** – Previously, when retrieving data it was possible for a 'Duplicate Key' error to occur where EziTracker provided more than one record specifying the exact same Site,

Staff member, Date & Time. Cleanlink Site Manager has been adjusted to accommodate for this eventuality.

CleanLink Site Manager Changes for V5.04.034

New Features

- 1) Hours Comparison Report** – (In Period). A new option 'Include Bank Holiday Hours' has been added. This option is only available when selecting the 'Compare with Contracted Hours' option. When selected - if there are any Bank Holidays in the period, the hours taken and paid (as displayed in the absence log) are added to the actual hours and pay per staff member. This is then included when comparing the actual with the contracted. The report clearly states if Bank Holidays are included in these figures. If the CSV option is selected then the Bank Holiday hours/value is added as a separate field. The actual holiday hours/values are also added to the export (but not included in any totals)

Fixes

- 1) Pensions** – This release will provide (to the Reports folder), a 'Pension_Leaver Errors.csv' file, detailing those workers who – when calculated with version 5.04.032 - had their Workplace Pensions Employment End Date (B016) set incorrectly, causing their Pension to end. Also, upon the next calculation of these workers, their missing contributions will be collected if possible.
- 2) PDA Forms** – The problem when adding clauses to the new staff form has been fixed

CleanLink Site Manager Changes for V5.04.033

New Features

- 1) Closed Site Report** – This report has been modified to allow selection by Division, Area, Client and Site and by Date Range. The option to export to a CSV and PDF have also been added.

Fixes

- 1) Timesheet Imports** – The problem with the standard monthly import of time sheets has been fixed. The problem was that when

using an offset month (i.e. 25th to 24th) and the current month had 30 days the last day of the sheet was not being checked for absences.

- 2) Pensions** – The problem whereby workers had their Employment End Date (B016) set, causing their Pension to end has been fixed and these false end dates will be removed upon applying this update.

CleanLink Site Manager Changes for V5.04.032

New Features

- 1) Holidays** - When entering holidays either in a pay cycle or via the staff screen the program will now calculate the number of days worked, based on their regular pay. For instance if you put in 10 days off which covers a weekend the number of days paid will be set to 8. This can still be manually over-ridden during entry.
- 2) Export to BACS** - a new format - **Lloyds Online** - has been added. A new version of data file, **BAFORMAT** will be added to the Data\Data folder in Cleanlink. *If you have other companies, you will need to copy this file to each of the others.*
- 3) Ezi-tracker 'Get Data'**. Following recent server connectivity issues caused by hardware and software changes at Ezitracker, we have re-written our 'Get Data' interface to enable it to:
 - a). be more likely to be able to make a connection
 - b). be able to persist gracefully in the event that an error condition should arise
 - c). provide better feedback to the user of data received

Background: Ezitracker sends data to Cleanlink in 'batches' of up to 50 rows at a time. If data has not been fetched for several days, then the number of batches may be significant. Since they implemented changes in May 2015, we have found that they are not always able to respond to each request from Cleanlink for subsequent batches. Previously Cleanlink would simply report this as an error and abort further processing. The changes we have

made mean that Cleanlink is better able to deal with this situation by automatically retrying and - only in the event of persistent failure - will it inform the user and allow them to decide whether to persist further at that time, or not.

- 4) **Ezitracker** 'Reset for Refetch'. A new facility has been added to enable users to **re-fetch** data that has already been retrieved from Ezi-tracker, without having to contact Ezitracker for a manual reset.

To use this facility, the user simply needs to provide the date, from which they wish to re-fetch their data.

Ezi-Tracker Processing

A. Send Clients	Send Updated Client/Sites
B. Send Staff	Send Updated Staff
C. Get Data	Get Logged Times
D. View Data	View/Amend Logged Times
E. Report	Report on Transactions

The items below should only be used following consultation with Ezi-Tracker

E. Global Sites Transfer	Transfer a Range of Clients
G. Global Staff Transfer	Transfer a Range of Staff

The item below should only be used with significant caution

H. Reset for Re-fetch	Reset 'last batch received' number
-----------------------	------------------------------------

Exit

- 5) **Ezitracker** 'Report on Transactions'. A new check box to filter this report to show only those that have errors has been added.

Ezi-Tracker Imported Data Report

Division [F5] Leave as 0 for all
Area [F5] Divisions/Areas
Client [F5] Leave blank for all
Site [F5]

In-Active Sites Action
 Include Exclude

Date range
From
To

Format
 All Under Hours Over Hours No regular
 Include Processed Transactions
 Exclude Transactions with oddities
 Include Variance on report
 Errors Only

CSV Output Preview PDF Output

OK Exit

Fixes

1) **The People's Pension extract.** Various changes have been made to prevent where possible, the 'false positive' reporting of the following errors:

- *ERROR: AE Date or deferral date must be completed if AE Status is Eligible*
- *ERROR: AE Status has incorrect spelling*
- *ERROR: AE Status cannot be Not Applicable for under 75s*
- *ERROR: AE date cannot be before employment start date*
- *ERROR: A Non-Eligible employee cannot have employee contributions if no opt in date has been set*

2) **Qualification dates** can now be entered with 4 digit years.

- 3) **Weekly Totals Report.** Previously, when selecting the option for staff only, only the header would be printed. This has been fixed.

- 4) **NI Category** letter validation. Previously, when entering a new employee record, the user may have become trapped in a validation test relating to the employee's age on their next Pay Day. The next Pay Date was determined by reference to the Pay Cycle, which on a new employee would initially derive from a Setup's default. If this default referenced a Pay Cycle that was no longer in use or where the Calendar for it was not extended sufficiently into the future for the Pay Date to be found, then an error would occur with a zero or similarly odd looking date. This has been 'fixed' by notifying the user of the root cause of the error and disallowing further modifications until the underlying cause is resolved.

CleanLink Site Manager Changes for V5.04.031

CleanLink NI Corrections Release

IMPORTANT NOTE

Any Payroll Calculation made with this release will:

- a) Calculate EE's & ER's NI differently than before
(EE's will pay more, ER's will pay less)
- b) Correct for previous NI calculation errors by
making up EE's shortfalls and reducing ER's NI to
account for previous overpayments.

Do not implement this update if you have any pay cycles in calculation mode. You must close these before applying the update.

This is because any recalculation will cause EE's & ER's NI values to change, affecting workers' Net Pay.

New Features

- 1) P45 printing - It is now possible to print plain paper P45's to HMRC layout. The old CleanLink plain paper version has been removed.

Fixes

- 1) NI calculation errors relating to the Statutory Threshold have been corrected. A "NI_errors.csv" extract will be output to the Reports folder giving details of the NI errors that previously occurred, and following Calculation, a "NI Error Recoveries Export.csv" is also available from the Pay -> Pay Cycles -> Reports -> 'P. NI Error Recoveries Export.csv" - detailing the corrections that have been made.
- 2) Workplace Pensions – Assessment records. Previously, it was possible to enter voluntary contributions against an Assessment

record which would subsequently be deducted from pay. The Assessment record is not an actual pension record, rather its purpose is to demonstrate that an Assessment of a worker in relation to workplace pensions' duties has taken place. Thus, the ability to enter contributions against an Assessment record has been removed and such records will no longer affect pay.

- 3) TPP extract, amended to report status as 'Eligible' for any worker other than a leaver, who was previously denoted as an Eligible jobholder but may have since changed status owing to earnings or age.

CleanLink Site Manager Changes for V5.04.030

New Features

- 1) Staff Anomalies report. People under / over the State Pension Age as of their next Pay Date, who have / have not been placed on NI Category 'C' will now be flagged in this report and the reporting of under/over 21's and under 16's has been updated also.
- 2) Staff Screen. The validation upon changing the NI Category has been improved in relation to Pensioners as 1) above – together with the validation of under 16's and under/over 21's. Please note that this screen will only validate *changes* to the NI category so as to avoid causing frustration to users who are simply navigating the Staff or changing other items where the particular NI category in use may not be their concern at that point.
- 3) Spreadsheet timesheets. You can now select the template you wish to use (as opposed to using the default template.xls). This is useful if you need differing templates for different pay cycles.
- 4) Timesheet imports. These can now allow for staff numbers without leading zero's.
- 5) Invoice export as .csv file. This can now be output in the format required by the 'Xero' accounts package.
- 6) Invoice Printing/Posting. Removed settlement discount on VAT in accord with revised HMRC regulations.
- 7) Employees Period Pension Report. You can now optionally include workers with zero contributions.
- 8) The Peoples Pension extract. Changes have been made to the reporting of worker statuses following TPP Specification changes.

Fixes

- 1) Anomalies report. The reporting of invalid NI Categories for over/under 21's before the 2015 tax year was reached has been

stopped and improvements have been made to the reporting of workers who (at their next pay date) will be below 16 or above State Pension Age.

- 2) Staff check program. Now correctly checking State Pension Age to report on use of NI Category 'C' at next pay date.
- 3) RTI FPS reporting of 'normal hours'. Previously, the system was significantly under reporting via the HMRC FPS Submission the number of hours normally worked (the regular hours). This has been fixed.
- 4) RTI FPS reporting of SCON numbers. Previously for the 2014/15 tax year, if a worker had a pension record with a related SCON number that needed to be reported, it would be done so against all NI Category letters and not just for the relevant ones (D,E,L,N,O). This has been fixed.
- 5) RTI transmission of SMP. There was a problem with the formatting of the RTI submission file in relation to this, that was causing rejection. This has been fixed.
- 6) Workplace Pension ME (member enrolment) extract. Previously, newly enrolled members have sometimes been missed from this extract owing to a missing contributions' start date at point of calculation for the period in which they were enrolled. This has been fixed.
- 7) Plain paper invoice print. Previously a 'Start Execution' and 'Execute Again' box could pop-up when printing invoices. This has been fixed.
- 8) Stores orders from mobiles. The import will be disabled if there is insufficient stock in the depot (internal stores only).
- 9) Adding new staff. Previously you could get an error message about the NI code before you had entered the DOB (and then, it wouldn't allow you to enter 'M', you had to Save and then go back and amend). This has been fixed.

- 10) Workplace Pensions. Previous Eligible Jobholders who had not reached the State Pension Age yet, but whom would do so within a year of the end date of the period being calculated, were incorrectly having their Eligible Jobholder status withdrawn. This has been fixed.
- 11) Payslips, Post Cycle. Previously the Gross for NI YTD figure also included the Pension From Gross figure for This Period. This has been fixed.
- 12) Invoices. When emailing invoices, the correct email body is now selected, (not the payroll one).
- 13) Staff Pension Report. This now correctly creates the .CSV file.

CleanLink Site Manager Changes for V5.04.029

CleanLink Payroll End of Year

BEFORE proceeding with the Year End for 2014/15 please ensure that you are running Version 5.04.029 or higher. If not please contact the support line on 0844 272 2122.

New Features

- 1) Payroll end of year - Update for 2015 code changes.
- 2) P60 Printing - the option to email P60's to staff has been added. For staff with no email address a 2nd pass is made printing these. Both email and printed formats use the CleanLink plain paper option.
- 3) Staff Report - Option 19 - Staff set to irregular pay has been added
- 4) Regular and 1 off Worksheets - A push button has been added to select a template instead of 'zooming' in the description box.
- 5) Full page Worksheets and Worksheet Summary - It is now possible to sort these by Area manager.

Fixes

- 1) The problem with the emailing stock issues from the mobile tab has been resolved.
- 2) Payroll Budget variance report - fix display of site budget.
- 3) EPS Creation - added last transmission flag.
- 4) Current Cycle Hours Comparison Report - Fixed the problem where the totals included items not on the print.

- 5) Current Worksheet Post - Fixed the problem where the next due date for worksheets with a 12 monthly frequency were not always updated.
- 6) RTI FPS transmission - The problem with the wrong leaving date being sent on a few occasions has been fixed.

CleanLink Site Manager Changes for V5.04.028

This release contains further changes to screen layouts, tables and reports. If you come across any of these that do not look right, please let us know.

New Features

- 1) Cases – The Cases function has been modified to interface with the CleanLink Portal. Cases can now be created on the portal and are received into CleanLink. Responses can be entered which are then fed back to the portal. Each response/Note from the portal can be up to 400 characters. To allow for this, all screens and reports have been updated. (See Appendix A)
- 2) P60 Printing – The plain paper version for 2014/2015 has been approved for use by HMRC
- 3) Site Stock to Mobile – A new parameter has been added to control which prices are sent to the mobile, Selling prices or Cost prices. Currently no changes to the App have been made.
- 4) Excel Timesheets – These can now be Exported/Imported for Monthly cycles.
- 5) Site Exceptions Report – A new option to check sites with/without a staffcheck code has been added.
- 6) Site Stop/Starts – The option to exclude/include In-active Clients as well as In-active Sites has been added.

- 7) Worksheet Templates – This new feature allows the setup of repetitive job descriptions that can be included in regular or one-off jobs. Each template consists of a Code, a 400 character description, a work Cost Price and a work Charge Price.

Code	Text	Work Cost Price	Work Charge Price
Daywork 1	Daywork: Execute daywork (General craftsman). Execute non-schedule items or extend existing repair for each hour worked as instructed. Carpenter, bricklayer, plumber, painter and general building trades.	25.00	33.72
Daywork 2	Daywork: Execute daywork (Plumber, Fitter). Execute non-schedule items or extend existing repair for each hour worked as instructed. Plumber, fitter.	25.00	33.72

During Regular or one-off worksheet maintenance, Zooming (pressing [F5]) when in the job description will cause a template pick list to be displayed. From here it is possible to select a template. On the selection, this description is added to the end of the current description and the work cost and work charge updated.

It is possible to add further templates by pressing [F5] again. NOTE – Once a template has been added it is possible to amend/overwrite the description but not to remove the template as a whole.

- 8) Payslip printing – 1 page plain paper format – it is now possible to display user defined text (customised per Pay Cycle) at the bottom of the 'Totals This Employment' box.

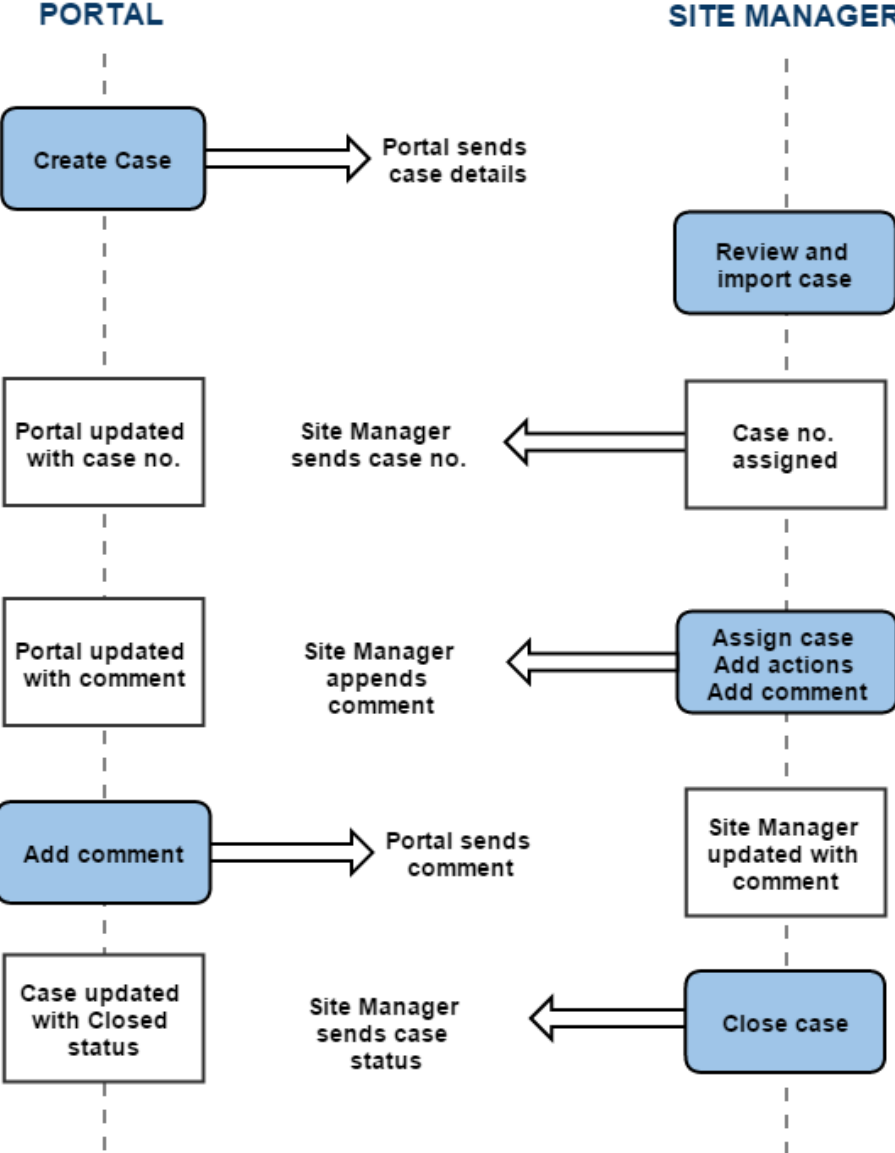
Totals This Employment								Net Pay
	Pension From Gross	Gross for NI	Tax	NI	Pension From Net	Pension Totals		
	EE	ER				EE	ER	
This Period	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Year To Date	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Please refer <i>queries</i> about your pay to <i>your Manager</i> in the first instance.								

This text can be entered via the Pay Cycles Maintenance screen, allowing you to have different text for each Pay Cycle. 'Rich Text Format' text is accepted, which enables you to use formatted rather than plain text should you wish. You can write this using (say) Wordpad or MS Word and then simply copy and paste it for use.

Appendix A

Cases Workflow with Portal

Case Lifecycle



CleanLink Site Manager Changes for V5.04.027

Fixes

1) Stock.

When posting Stock to Invoices, if the Client has settlement discount terms these are now automatically added to the invoice.

CleanLink Site Manager Changes for V5.04.026

Fixes

1) Holidays.

See: Pay -> Pay Cycles -> Pay by Staff -> Select Staff -> Holidays.

Previously, the 'Add' and 'Delete' buttons were sometimes enabled but would not work. This has been fixed.

CleanLink Site Manager Changes for V5.04.025

Fixes

1) Holidays.

See: Pay -> Pay Cycles -> Site Summary -> Staff at Site -> Holidays.

Previously, the 'Add' and 'Delete' buttons would only work if you first manually switched to 'Modify' mode. This has been fixed.

CleanLink Site Manager Changes for V5.04.024

Fixes

1) Holidays.

See: Pay -> Pay Cycles -> Site Summary -> Staff at Site -> Holidays.

Previously this would display an 'Initial Task mode not allowed' error. This has been fixed.

2) Staff -> Starter info -> Data from Mobile -> Questions.

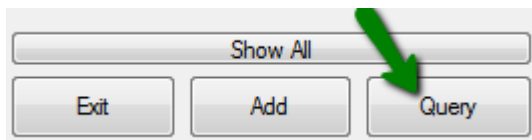
Previously this would display an 'Initial Task mode not allowed' error. This has been fixed.

CleanLink Site Manager Changes for V5.04.023

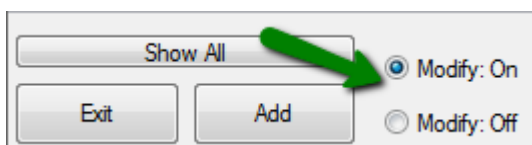
Fixes

1) Staff, Screen.

Previously, there was a button that 'toggled' between Modify & Query Mode.



The button caused some confusion because... a) it stated the opposite of the mode you were currently in and... b) it did not always correctly reflect the actual mode in any case. This button has been removed and replaced with a 'Modify: On' and 'Modify: Off' control.



This control will - (upon Cleanlink start-up) - default to Modify: On, provided the user has the appropriate Rights. If changed during a session, it will remember its setting until Cleanlink is closed. Finally, all of the Tabs within the Staff screen will now take general notice of this control and operate accordingly.

Note, when **Modify: On** is enabled, this means that modifications are *generally* allowed – but there may be some situations where modification is still denied owing in a particular circumstance owing to the logic prevailing within a particular situation.

When set to **Modify: Off**, no modifications are allowed. This is useful for reviewing records without fear of accidental changes.

2) Staff Screen.

Various improvements have been made to the navigation between the Staff list and the Tabs, enabling better traversal up and down the Staff list whilst remaining on the previously selected Tab or sub-tab.

CleanLink Site Manager Changes for V5.04.022 thru .001

This release of CleanLink includes an update to the latest release of our programming language. This has involved some internal changes to the operation of CleanLink. The results of these are that many screens and reports have been modified. The background screen size has been increased as have many of the tables. We will be working our way through the others during the next few releases. Some other changes have been in the reversal of tables so that the latest is at the top. This stops the need to page down across history.

Due to these changes, if during your use of the system you notice anything not fitting within its box/screen or any other anomalies with displays please notify us at support@cleanlink.co.uk.

Another outcome of this update is that it cannot be released as an automatic update and requires us to access your system to implement this. During the course of the next few weeks we will be contacting you to arrange a mutually convenient time to implement this update.

As well as these screen changes there have been some other facilities adding and bugs fixed. The main ones of these are highlighted below:

New Features

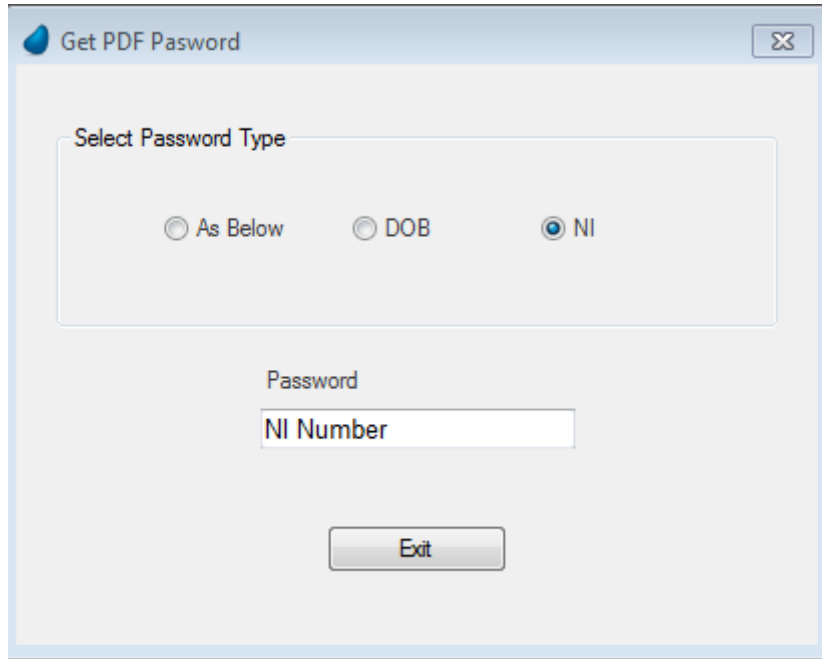
- 1) Emailing. This is in two parts, the first is the addition of multiple 'send' email addresses. It is now possible to have a different email address on each group of documents:



These are set up via the right click menu, email, Parameters.

Also under development is the ability to by-pass 'Outlook' and email directly to your ISP. This has the advantage in that the senders email address can be used as opposed to the outlook default email address. Currently this is only working for a limited number of ISP's, more to follow. A dis-advantage of not using outlook is that there is no visual record that the email has been sent. Although it is possible to record the sending of emails within CleanLink this does not prove the email was sent as with the 'Sent Box' of outlook.

- 2) Payslips – When emailing payslips it is now possible to set a read password on the PDF. If this option is selected a further prompt is issued for the type of password:



This can be free format (As Below), this will apply to all the payslips in the run. Date of Both (DOB) this is in the format DDMMYYYY or NI Number. Note if NI Number is selected and the staff record does not have one the password is set to NONINUMBER.

- 3) Mobiles – It is now possible to select the Highest grade of staff to be exported to a mobile.
- 4) SMP payments – When adding an SMP record if necessary (i.e. TUPE transfers) it is possible to set the number of weeks and amount already paid. NOTE this can only be done when first adding the record so ensure you have the information to hand.
- 5) Exports to Portal – It is now possible to select which clients are exported to the portal. A new flag has been added to the client screen (as below).

Fax Number	<input type="text"/>
Email	<input type="text"/>
Email for Invoices	<input type="text" value="client@abc.co.uk"/>
<input type="checkbox"/> One Off Client	User Code <input type="text"/>
<input checked="" type="checkbox"/> Client Active 13/12/01	<input type="checkbox"/> Exclude From Portal

The file names of the exported files has been changed. Invoices now include the date and Audits include the location.

- 6) One Off Invoices – When previewing on of Invoices the option to omit Invoices on hold has been added.
- 7) Site Closures – When entering the dates a site is closed a new option 'Pay Holiday' has been added. If set, when a cycle is opened for the staff with regular pay at that site a holiday record is set. It is assumed that all staff qualify for the holiday and may need manual adjustment.

Fixes

- 1) Current Pay Budgets – It is now possible to amend the budgeted hours as well as the budget pay in the 'All Site Summary' within a pay cycle.
- 2) Regular pay rebuild – Occasionally during this process a 'duplicate key' message would appear, this has been fixed.
- 3) Sending Invoices – if a site had the 'Email and Print Invoices' box ticked it was not always printing the invoices. This has been fixed.
- 4) Delivery Address on stock docket – Changes to the delivery address via issue maintenance were not being recorded. This has been fixed.
- 5) The CA6855 message has been removed from the staff NI checks as it is no longer applicable.
- 6) Multiple P32 report – This now selects the periods to include based on the pay dates being between the 6th of 1 month and 5th of the next.