CleanLink Site Manager Changes for V6.08

Important – Payroll Operators: 2018/19 Statutory Release.

This release provides the necessary End of Year Cleardown functionality for the 2017/18 tax year and implements the legislative changes needed for continuing payroll operations into the 2018/19 tax year. It provides updated parameters, thresholds etc., for PAYE/NI/Pensions/NMW & NLW.

For detailed guidance on the End of Year Cleardown process, please see our videos:

End of Year Cleardown video

NMW/NLW uplift explanatory video

There is also an accompanying document detailing the processes: see… \Cleanlink\Crib Sheets\CLEndOFYear.pdf

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New Features:

1. **End of Year Clear Down message screen.**

A new message screen has been introduced to remind users to not open cycles in the new tax year without previously having ran the relevant end of year clear down. The first cycle(s) of a new tax year can only be opened after the message has been acknowledged.

2. **Staff Starters & Previous Loan screens.**

These screens have been redesigned to make it easier & faster to find and view staff information.

P45/P46/Student Loan data has been moved to the Previous/Loan screens.

Past Employers / Questions & Supporting Documents / Signature information remains on the Starter Info screen

Previously the Data from Mobiles/Questions/Signatures was only available via a separate button press in Staff > Starters, making this screen laborious and cumbersome to work with. This is now replaced by 3 distinct tabs which will show these data without a separate button press, allowing you to navigate the staff list quickly, whilst viewing the data for each corresponding person.

The data for Live/Left workers has also been separated into different files to keep the live file as small as possible, which together with a new check box that can be used to optionally display the images, means that this screen isn't slowed down unnecessarily by the display of images for people who are not of concern, which will dramatically improve the responsiveness of this screen for customers with lots of documents/images.

3. **Clients > Overview Report.** The option is now available to include inactive Sites in this report.

4. **Pay Cycle > Amendment Log.** The option is now available to export this report to csv.

5. **Query, Information Search.** The option to output to csv has been added to option 1 of this program.

6. **Paper Paysheets.** The option to print an additional number of blank lines per site has been added to the printing paysheets program. If left zero, the current defaults will continue to be used.

7. **Cycle > Hours Screen > Absence Notes.** The ability to edit notes for absence when entering via the hours screen in the Pay Cycle has been added. The notes entered will be reflected in the Logged Absences screen and the Holiday Log report.
8. **Machinery.** New machinery items now have the cost per week set as the default for that machinery type.

9. **Invoice Export**. A new accounts package type has been added for Quick Books Online ('QB Online'). When set, the invoices/credits are exported in this new format. QBO cannot accept invoices and credits in the same file and so it has been necessary to export these as two separate operations.

10. **FPS Transfers**.

Previously, if no response was received from HMRC the transfer suspends and can be picked up later. This has caused confusion with users, sometimes resulting in an FPS not being sent.

Typically a no response occurs for one of 2 reasons:

1) The link to HMRC cannot be established
2) HMRC is busy and failed to respond in the time we allow (approx 8 mins)

The program has been changed so that if there is no response the transfer is **cancelled** and an entry in the XML History type 'Send Fail' created. Such failure types will of course not have an XML response file attached. .

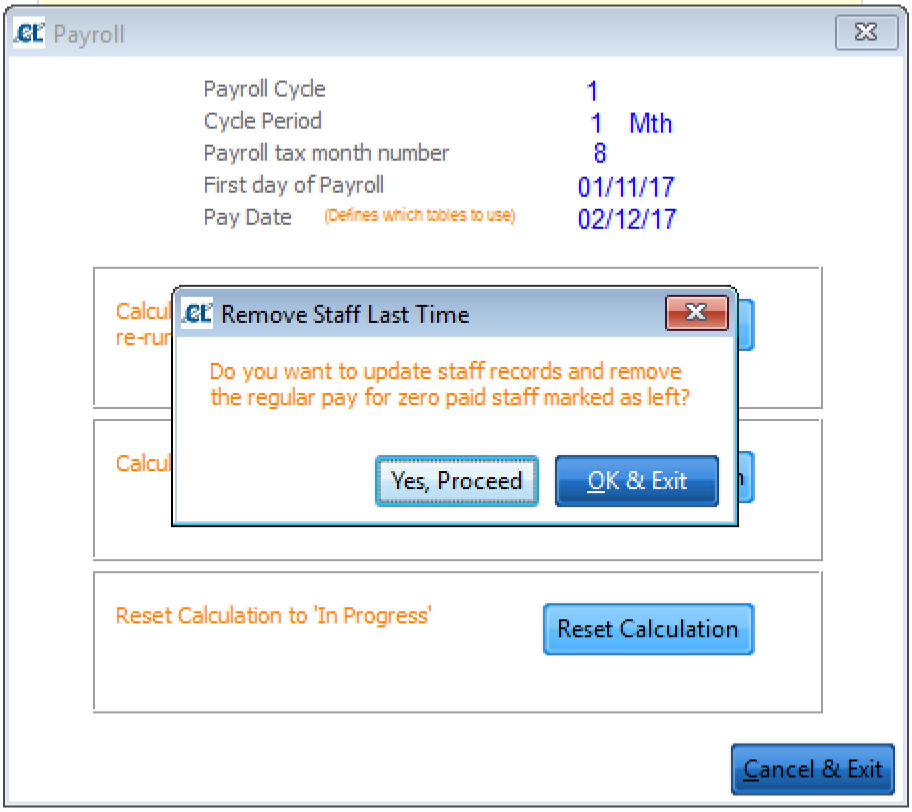
11. **Mobiles, Send data to all mobiles**.

An extra prompt to continue has been added for confirmation that this process should be run, with a warning message given that it may take some time.

12. **Payroll - Zero Paid Staff - Last Time.**

Previously, if staff are marked as leavers in a cycle, but they had zero pay, this was lost at calculation time.

To correct this a further prompt has been added:



If 'Yes, Proceed' is selected, then the staff leaving date is set and their regular pay is removed.

Fixes:

1. **Regular Site Pay.**

Previously, staff without the Senior Right were still able to view the Regular pay for senior staff via Site > Reg Pay even though those Senior staff not correctly not visible to them via Staff Maintain. This has been corrected with the removal of the totals on the first screen and the second screen changed to not display column totals if senior staff are found.

2. **Mobile Forms**.

Previously, when in the Mobile tab and Forms, amending the 'Order' column in the Clauses had no effect in re-sequencing, either there or when having been sent to the mobiles. This has been fixed.

3. **Partial Calc Screen**.

Previously, the incremental search facility did not work in this screen. Incremental search is where typing successive characters locates incrementally towards records corresponding to the characters typed so far. This has been fixed.

4. **Pay > Staff at Site.**

Previously, when clicking the Staff at Site button for a Site without Staff, an endless loop would occur. Attempts to leave the screen would result in a "Staff Member does not exist" error, leaving you no alternative than to kill the runaway task via Task Manager. This has been fixed.

5. **Hours comparison report.**

Previously, Sites with hours entered in Cont Hours for the current cycle were not being included in the Hours Comparison Report (weekly Totals). This has been fixed.

6. **Maintain Staff – Browser (spreadsheet) Format.**

Previously some of the columns had incorrect headers & descriptions. This has been fixed.

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CleanLink Site Manager Changes for V6.07

Important - Changes to the Government Gateway:

secure.gateway.gov.uk

The Government Gateway developed in 2002 is nearing end of life and will be decommissioned on 14th February 2018. It will not be able to accept submissions (e.g. RTI FPS) from this date.

They have developed a new version for Document submission via a new transaction engine, available at a new URL:

https://transaction-engine.tax.service.gov.uk

Cleanlink Site Manager v6.07 implements this URL change.

Please note: If you have implemented any specific Firewall restrictions governing your external communications, please ensure that you revisit them and make the necessary amendments to accommodate this new URL endpoint.

Fixes:

1. Pay cycle > Adding Cover staff, Pay Rate not picked up.

Previously, when adding cover staff to a site in the pay cycle (Staff with no regular pay for that site) you could add hours but it did not pick up a default pay rate from Staff/Site/Company. To be able to pay the employee you had to manually enter the pay rate. This has been fixed.

2. Pay > Pay Cycle > D. Timesheet Import (Spreadsheet Format).

Previously, Holiday Pay was occasionally being incorrectly shown as a non-contracted day. This has been fixed.

3. MITC interface - Changes have been made to correctly interpret Staff Check Codes and the Date Format

4. Setups > K. Payroll Cycles, Pay Items.

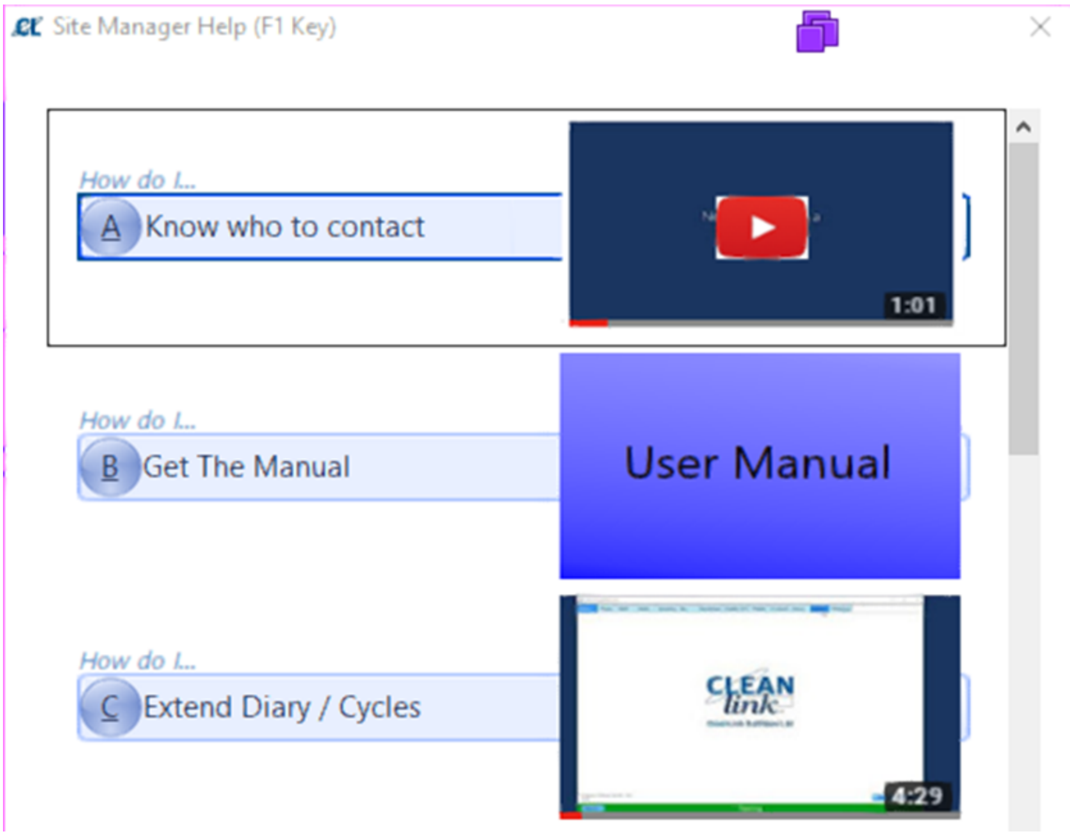
Previously, when Pay Item 'REG1' did not exist, it would be automatically created. However, the Site column was not also being set and it not maintainable by users. This has been fixed.

5.Sage Micropay. A new Gross export format has been created.

CleanLink Site Manager Changes for V6.06

New Features

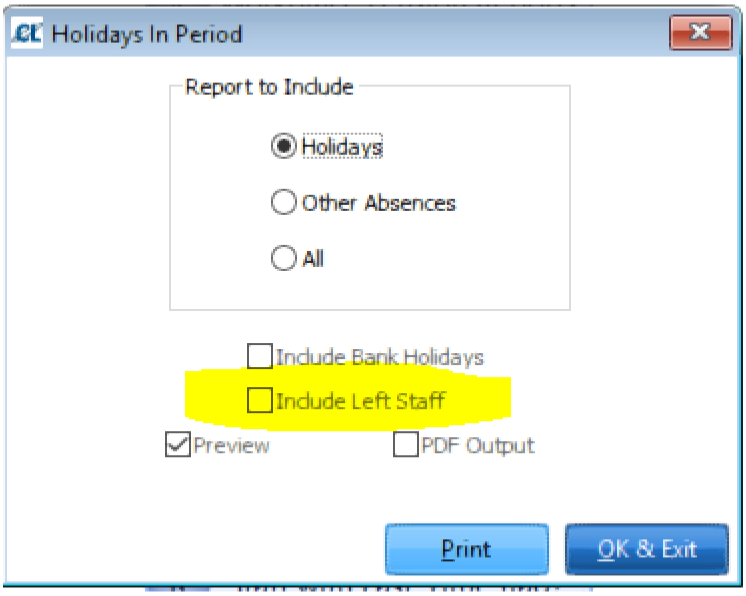
1. **How To Videos –** A range of videos has been introduced to provide instructional 'walk throughs' of how to perform particular tasks within Cleanlink. They are available from anywhere via the **F1** key or from the main screen via the '**How do I…**' button. They will open in your own web browser, so you can have them play whilst you follow the steps within Cleanlink. Don't forget to have your sound turned on!



More 'How to' videos will be added in future releases.

2. **Adding machinery to a Site via a Mobile** - The mobile app includes the option to add machinery to a Site and this data can now be imported into Site Manager. Please see Cleanlink\Crib Sheets\Adding machinery to a Site from a mobile.pdf for more information.

3. **Holiday reporting**: ***Pay Cycle > Reports > X. Hols / Absence in Period*** – Previously, this report would automatically pick up past leavers. It has now been changed to only do this if the option to '**Include Left Staff'** has been checked. They will also be identified on the report.



Also, when the **'Include Left Staff'** option is checked, a message has been added to the report where Staff have Holiday but they are not being paid in the current cycle:

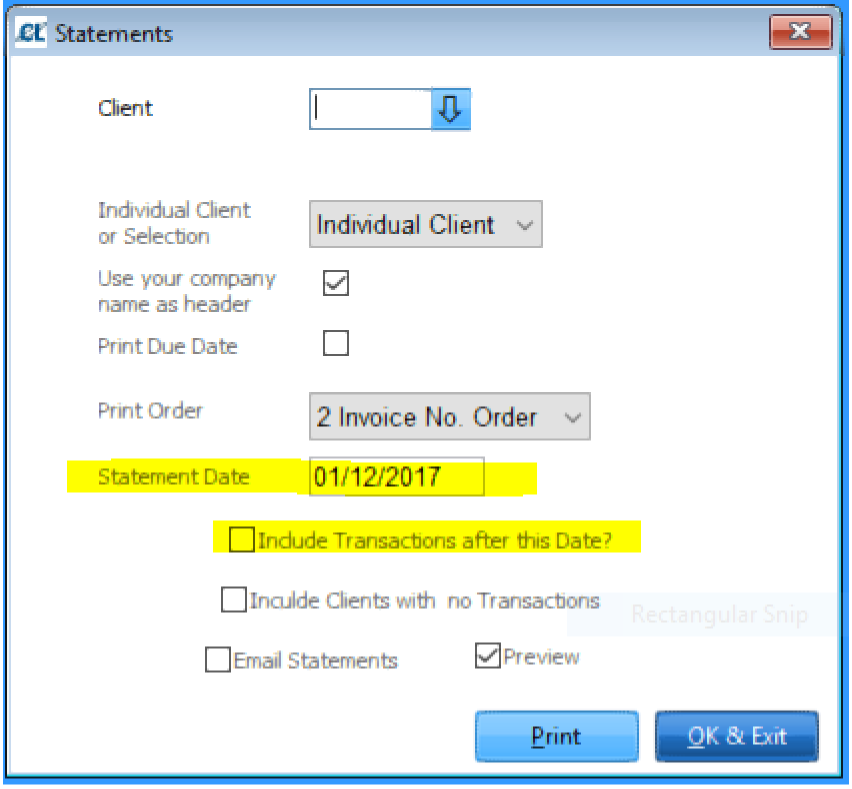
Alans Test Data **Holidays - Pay Cycle 1** **Date: 17/11/2017**

Monthly for October 2017 Tax Mth 7

Staff	Site	From	To	Type	Days	Holiday Pay	Deducted	Paid
00022 PETERSHAMABCDEFGHIJ, Gerald						Not Paid in This Cycle		
ABB001	0001 ABBOTTS MILL	10/10/17	10/10/17	HO	0.0000	25.00	Yes	Yes
No. Staff 1			Total Holiday Pay			25.00		

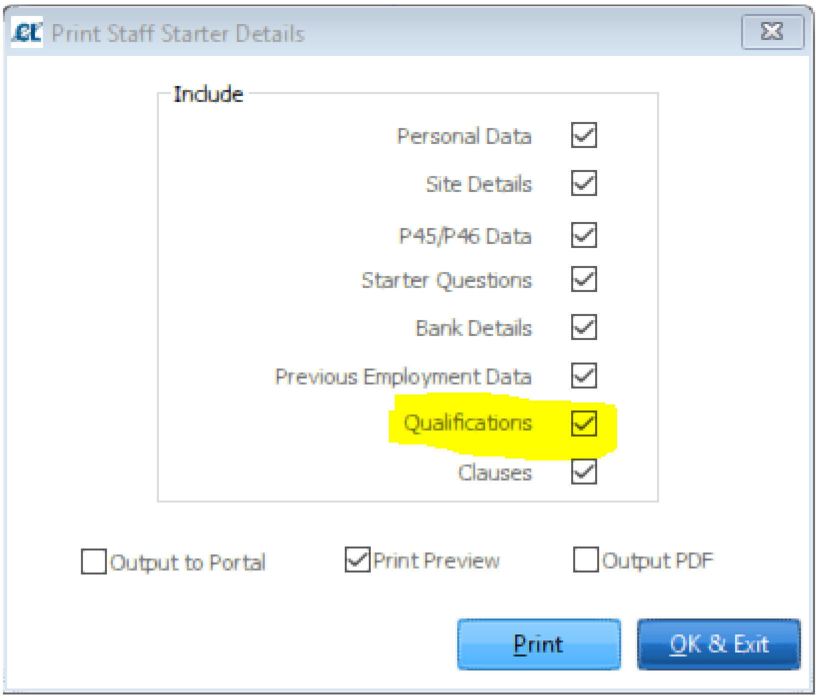
Report Completed

4. **Invoicing >** ***L. Statements –*** To better satisfy the needs of Clients that require a Statement denoting a balance due as at a particular date, a new field 'Statement Date' together with a checkbox 'Include Transactions after this Date?' has been added:

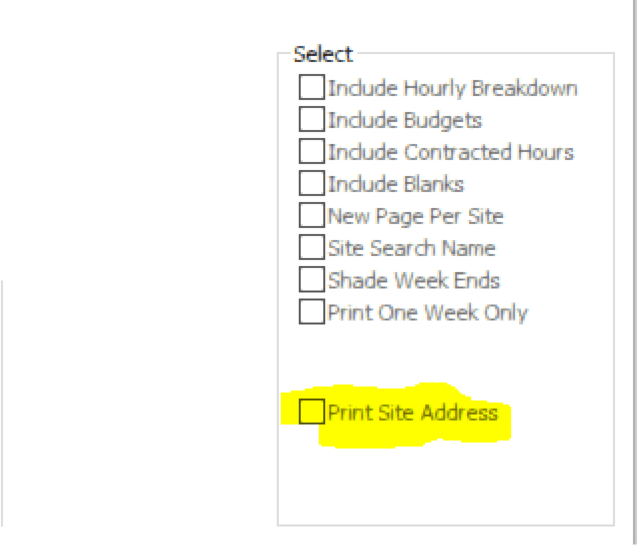


5. **Emergency Contacts –** Have been added to Staff Maintenance, Staff Report and New Staff from Mobiles, to enhance what was previously only 'next of kin' recording.

6. **Staff Starter Details print** – A new tick box option has been added to include the Qualifications on the staff starter details print.

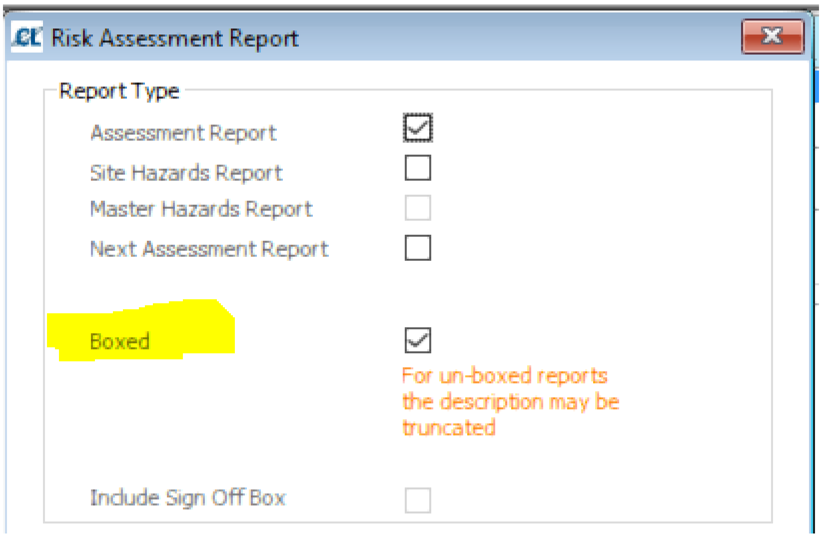


7. **Regular Timesheets: Pay > B. Regular Pay Sheets** - An option to print the Site Address has been added to the printed regular Site timesheets. If selected, the Site Address prints 1 line below the Site name.



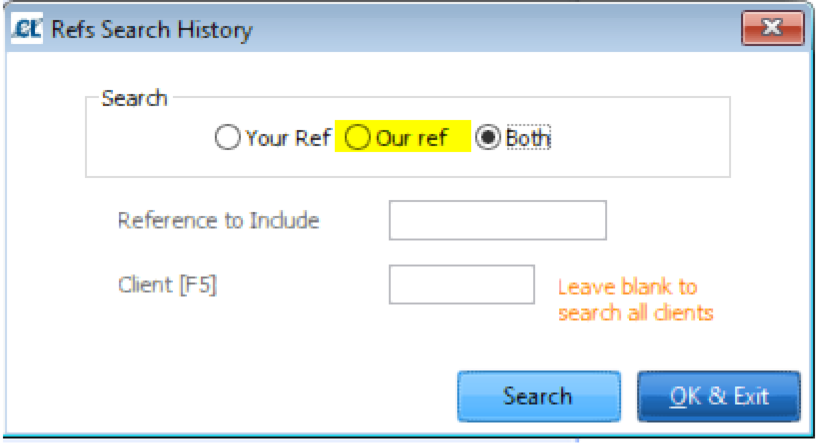
8. **Clients > I. Management Reports > C. Starts & Stops** - A new option has been added to allow the inclusion or exclusion of 1 off Sites.

9. **Risk Assessments: Maintain Site > RA > Report > Boxed (tick box)** – An extra option 'Boxed' has been added to the report selection. If ticked the report as current is produced. If not ticked, then a single line per assessment is produced.

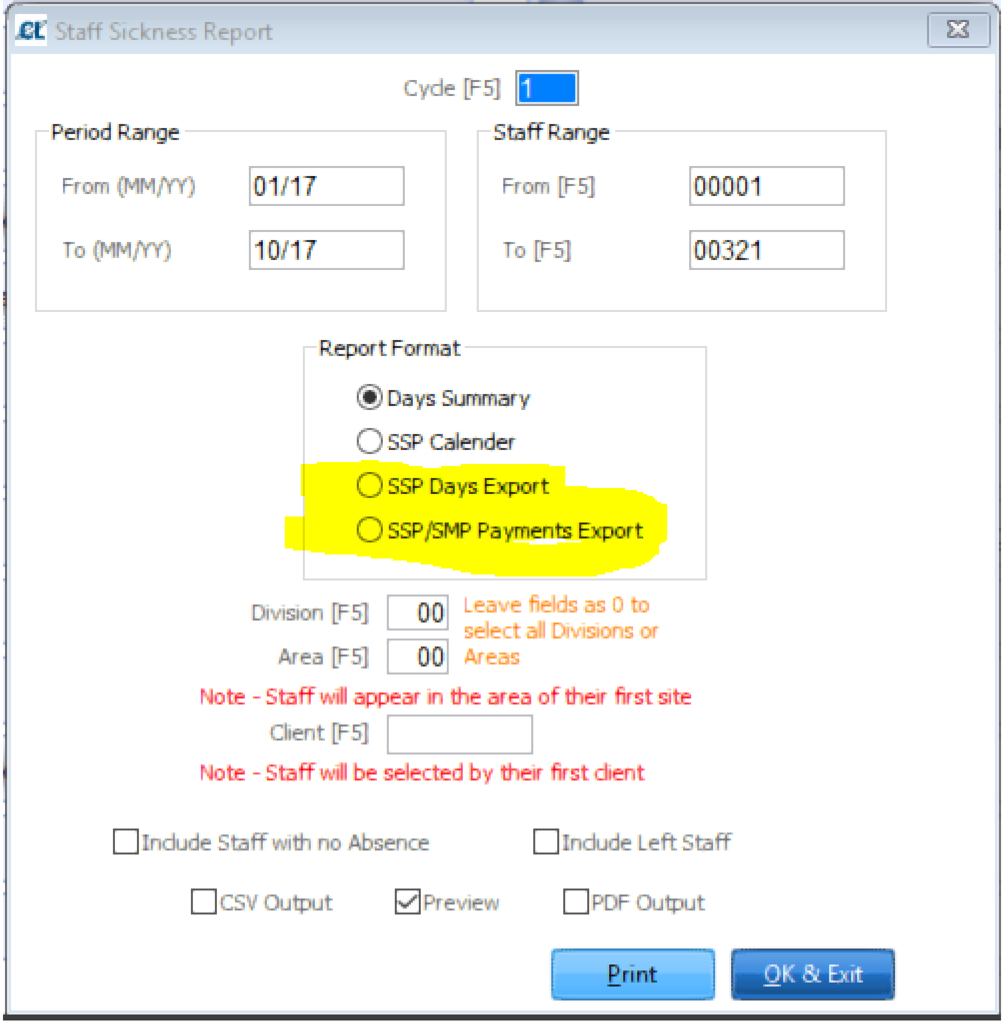


10. **Site notes sent to Mobiles: Client > Maintain Site > Notes - Site Notes field –** This has been extended to allow notes of up to 2000 characters to be sent, where the Type is set to ‘M’.

11. **Query > I. Invoices by Reference** – This has been enhanced to allow searching by ‘Our ref’:



12. **Staff > H. Payroll Report > H. Staff Absence Report –** Two new selections have been added to the Staff Absence report: SSP Days Export and SSP/SMP payments Export:



Fixes

1. **FPS CSV extract** – Previously this report did not state where it had exported its extract file to. This has been fixed.

2. **Site Notes: Maintain Site > Notes / Maintain Clients > Client Notes** – Previously, the Sites Note log was printing the Site Address even if selected from the Client tab. This has been changed to print the Client address if selected from the Client.

3. **QC Report Visits with Full Case History & PDF Output ticked** – Previously this would cause Cleanlink Site Manager to crash with a mgaxparuntime error. This has been fixed.

4. **Anomalies report** –Previously, when this report was ran from a Closed cycle it would give inaccurate figures for Holiday days taken over accrual days. To prevent this, the holiday checks have been removed from this report if it is being ran on a closed cycle. Please note that this report is designed to detail anomalies in the **currently open cycle** to enable detection & correction of anomalies **before** a person is paid, Nonetheless, its use is not restricted solely to open cycles because we know that some customers still find it useful.

5. **Pensions – Nest & TPP contribution schedule extracts –** Previously, these exported files did not contain a leaving date when a leaver was marked as such in the current pay cycle via the 'Last Time' flag, either pre, or post closing of that pay cycle. This has been fixed.

6. **Pensions – Percentage of Gross type** – Previously, the YTD and all time cumulative contribution figures for staff with Percentage of Gross pension types were not being updated. A rebuild of Pensions YTDs corrected it, but this was needed each time. This has been fixed.

7. **Regular Worksheets "Select a Template" button** – Previously, when creating/amending a Regular Worksheet the "Select a Template" button had no effect. This has been fixed.

8. **Holidays** – Previously, when booking holidays through Staff > Holidays > Log Holidays it was possible to pay staff twice for the same day(s) if the holiday dates overlapped with other bookings. This has been fixed.

9. **Warnings** – Previously, if the Warnings screen was set to automatically open (via the 'Regular Display of Warning' checkbox) after the 'Display Interval in Minutes' elapsed time had expired, it would open and fill whatever screen/box the user happened to be on at that moment. This could result in the Warning screen not fitting into the space available for it and in such cases, any attempt to scroll through the screen caused it to disappear. This has been fixed.

10. **Stock Order History** – Previously, when emailing a Purchase Order rather than a delivery note, the email header and attachment file name used the Delivery note number rather than the PO number, leading to possible confusion with the supplier. The following changes have been made to ameliorate this:
    a. We have changed all document formats to print the **Issue ref** as our ref. If the document is printed as a Purchase Order, then an extra reference PO Number has been added.
    b. We have changed the header message to denote if it is a delivery note or a purchase order being printed with the relevant reference and Site name
    c. We have changed the filenames of the created PDF's to either be DNxxx or POxxx according to their type and amended the email title accordingly.