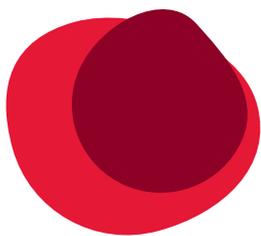# Sage Pastel
Payroll & HR

Partner

For small and medium businesses

Join the mainstream and let our software do it all for you

sage

Sage Pastel Partner Payroll provides you with an easy-to-use, accurate and secure Payroll Solution with all the features you require. It is an ideal solution for any size and type of business and ensures that your business is kept up-to-date and complies with the latest legislative requirements.

Sage Pastel Partner Payroll is available as a stand-alone, single-user product for the smaller company, or is scalable up to 10-users for a larger company and can accommodate an unlimited number of employees.

Compliant with SA Legislation °

- Sage Pastel Partner Payroll caters for the calculation of pay for annual leave taken and notice pay according to the Basic Conditions of Employment Act (BCEA).
- Caters for many different types of tax calculation methods, e.g. periodic, average, directive, director's tax, etc.
- Annual tax table and regular statutory upgrades keep your Payroll up-to-date with legislative changes.
- All statutory requirements, e.g. EMP201 and EMP501 returns, OID, SDL and UIF declarations are catered for.
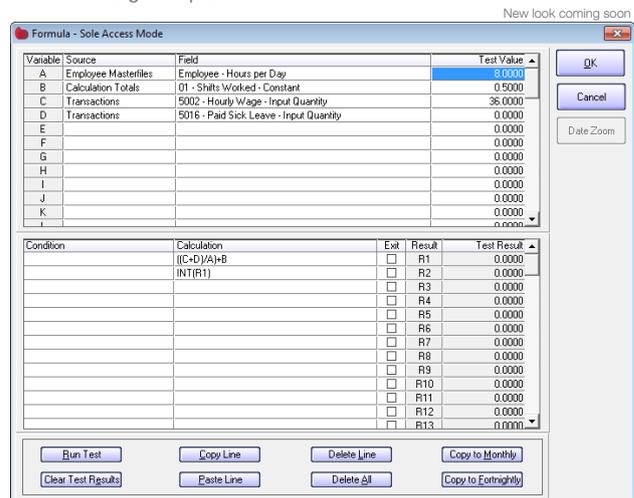
Assistants (Wizards)

- Sage Pastel Partner Payroll has many Assistants (Wizards) which guide you through tasks making them simple and intuitive, e.g. the Setup Assistant, General Ledger Integration Assistant, Payroll Run Assistant, Period/Year-end Update Assistant and the Payslip Paper Style Assistant.
- Use the Setup Assistant to create a company in minutes, by answering a few simple questions and selecting your preferred date and formats. It's that easy!

New look coming soon

Unlimited Scope

- Unlimited earning and deduction types can be defined.
- Process weekly, fortnightly and monthly paid employees..
- Set up multiple user-defined fields for additional employee information (6 alpha-numeric fields, 12 numeric fields, 6 date fields, 6 Yes / No fields).
- These fields can be used in both formulae and lookup tables.
- Create multiple income, deduction, contribution and benefit transactions from pre-defined sets of transaction templates.
- Allows for multiple rates of normal and overtime pay.
- Use the Employee Filter facility to select the required employees and generate reports by Employee Code, Pay Frequency, Cost Centre, Job Code, etc.
- Use the Batch Processing facility to electronically import recorded hours from clock-card systems, directly updating the payslip.
- Customise your transaction templates by setting up your own formulae and creating lookup tables.

New look coming soon

User Friendly Payroll & HR software with all the features your business requires.

Sage Pastel Partner Payroll caters for the full spectrum of requirements, from pre-defined standard sets of transactions for less complicated Payrolls, to more powerful and customisable features and functions for Payrolls with more sophisticated requirements. At Sage Pastel Payroll & HR, we believe in working smarter, not harder. Meeting your South African Revenue Services (SARS) obligations every month takes considerable time and know-how°. So you'll appreciate Sage Pastel Partner Payroll's easy, efficient processing ability. At the touch of a button, you'll comply with even the most complex of legislation with our software that does it all for you. Our dedicated focus and specialist expertise are the reasons why more businesses choose us as their preferred tax, HR and Payroll partner.

Automated Updates

- If you have an active internet connection, installing updates for your Payroll and HR software will be quick and simple.
- With our latest Automated Updates technology, your Payroll Software will always be processed using the latest version with up-to-date legislative changes.
- You no longer need to visit our website to download and install updates manually, our software now does it all for you.

Payroll News (RSS Feeds)

- Sage Pastel Partner Payroll will publish RSS Feeds to keep you informed of any legislative changes, important industry related news and new software releases and features.

Password Control

- Set up multi-user access with various password restriction levels.

Simple, Quick and Easy-to-Use

- All the transactions you require are already created for you upon installation.
- Capture payslip data in a batch format or process the payslips in 'real time' mode with live on-screen calculations.
- Quick and easy termination or reinstatement of employees.
- An on-screen Status Bar indicates which period your Payroll is currently in.
- Quickly set up new employees by linking them to a pre-defined employee profile that automatically populates their default transaction information.
- Allows you to link all employee information such as CVs, letters of employment, disciplinary letters, schedules, etc. Notes can also be linked to external documents such as spreadsheets. Assign an action date to each note and print 'to-do' lists based on these action dates.
- Adding a new employee is easy, fast and intuitive, with our Quick Edit Mode guiding you through all the statutory fields that are required.
- Store relevant information, such as photographs of your employees for easy identification.

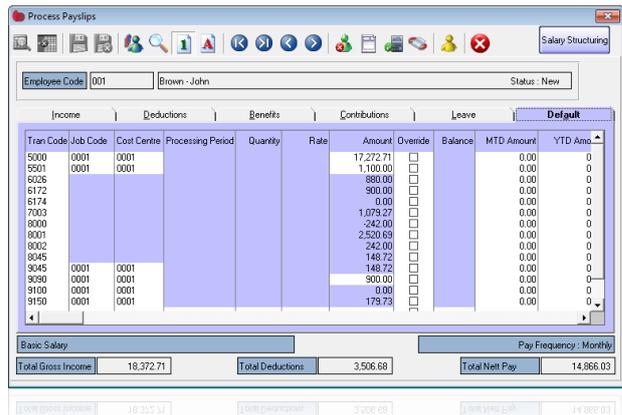New look coming soon

Processing

- Perform 'what-if' payslip calculations on-screen.
- Process by exception - you only need to enter pay and / or deduction information when there are changes, e.g. overtime.
- Process and print payslips for groups or for selected employees.
- Affect global changes for employees linked to a specific profile, eliminating the need to adjust each individual's payslip periodically.
- Control employee loans with automatically calculated interest on outstanding balances.
- Supports fifth week or third fortnight Payroll processing.
- Records and accumulates shifts worked.

Payslips

- Sage Pastel Partner Payroll automatically calculates all the income, deductions and company contributions according to your requirements.
- View the payslip with the nett salary on-screen before you print cheques and generate electronic bank transfer files.
- In addition to Sage Pastel Partner Payroll's standard facility that enables you to e-mail secure password-protected payslips to your individual employees, you also have the option to utilise our bulk e-mailing facility.
- You are able to e-mail groups of payslips to a specific employee, manager of a cost centre or paypoint, a specific contact in your Microsoft® Outlook address book or any specific Payroll user.
- Payslips can then be printed onto our professional pre-printed and confidential stationery at remote destinations instantaneously and distributed to the individual employees, saving you money on

postage; with peace of mind that the payslips will never fall into the wrong hands.

New look coming soon

Enhanced Help Facilities

- A context-sensitive Help Facility (F1) is available with detailed explanations of each function or field.
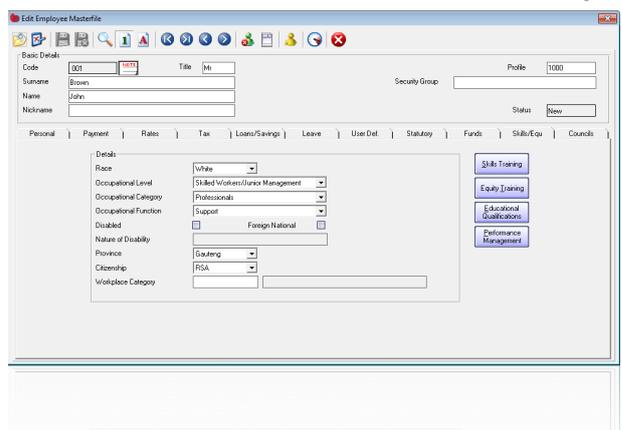- The Legislative Help File details all the statutory requirements for your Payroll.

Provides Flexibility

- Process special Payroll runs such as commissions, bonus payouts, back-pay, etc.
- Process payslips for individuals or groups of employees at any time, using the Employee Filter option.
- Customise payslips, cheques and labels with the user friendly 'drag & drop' Forms Designer feature, e.g. insert your company logo onto your payslip.
- Define your coinage denominations for cash payments.

Reporting

- Print coinage analysis for defined cash payout denominations.
- Option to preview payslips on-screen before the final Payroll calculation is done.
- Record all the necessary information fields for complete Employment Equity Reporting as required by the Department of Labour °.

New look coming soon

- Print an audit trail of any changes to masterfile information.
- Print transaction history reports for any period.
- Output reports to screen, printer, Microsoft® Word and Excel, PDF or HTML.
- Generating reports is made easy with an advanced filter function to select the relevant employees for the report.
- Print each employee's payslip in any of the 11 official languages or set it up to print your payslips in the language of your choice °.
- Reprint payslips for previously processed periods.

Leave Processing

- Automatic accrual of annual leave days due with detailed leave records for all leave types on an annual, daily or hourly basis.
- Calculate the number of leave days by automatically excluding non-working days in the leave period.
- Leave payout calculations on termination of employees.

General Ledger Integration

- Generate Payroll and Cashbook Journals for seamless General Ledger Integration with Sage Pastel Xpress and Sage Pastel Partner Accounting as well as most other accounting packages.
- Integrate by Expense Account and / or Cost Centre.

Free Custom Report Writer

- Allows you to create any type of report according to your business requirements.
- You can access a customised report layout in any of your companies thus eliminating the need to customise a report more than once.
- Create simple data listings by using the Report Assistant or create more complex reports using the advanced customisation and design features.

Optional Modules □

Our Optional Modules provide you with solutions specific to your Payroll processes and industry. These modules include Sage Pastel Payroll Intelligence Reporting, Industrial Council Compliance and Sage Pastel Connect (including Credit Checks and Secure EFT Salary Payments options).

Sage Pastel Payroll Intelligence Reporting

- Sage Pastel Payroll Intelligence Reporting is a reporting tool that allows you to manipulate reports in order to make improved business decisions.
- If you entrust Microsoft® Excel to share, present and analyse information, then this module is for you.
- Sage Pastel Payroll Intelligence Reporting is a module that dynamically links to your Payroll data, taking your business way beyond traditional reporting functionality, using the power of Microsoft® Excel.
- Our standard, 'pre-set' reports save you time. This module ships with more than 20 standard report formats such as a Job Costing Report, Year-on-Year Leave Comparison Report, Leave Taken Listing, Rate Report, Years of Service listing, to name a few.
- You can customise the standard set of reports and templates, and even create new ones.
- If you retain and save the design of your spreadsheets, you will avoid having to re-format them every time you generate the Excel report.

Industrial Council Compliance °

- Sage Pastel Payroll & HR caters for the following Industrial Councils: MIBFA, MIBCO/MICFA, the Electrical Industry and the Road Freight Industry as well as the Private Security Industry.
- This module will even provide you with the ability to generate the applicable Industrial Council's electronic submission files.
- Now you no longer have to manually complete the Industrial Council reports. Simply generate the submission file and e-mail it to the applicable Industrial Council at the click of a button.
- This way you are ensured that all your calculations are correct the first time around, eliminating the chance of data-capture errors.

Sage Pastel Connect Solution °

Validations and Verifications:
You can enjoy the benefit of validating and verifying your employees' ID Numbers and Bank Accounts by paying a modular fee on a monthly or annual payment plan. To make use of the Validation and Verification services contact your Sage Pastel Payroll & HR Certified Installer. Alternatively, contact Sage Pastel Payroll & HR directly on +27 11 304 4100 / 4200 / pastelconnect@pastelpayroll.co.za

- **Bank Accounts (Verify and Validate)**
  Bank account validation ensures that a valid bank account has been entered into your Payroll System and bank account verification ensures not only that the bank account is valid and in existence but also that it is in the name of the employee specified on your Payroll. This eliminates one of the most critical areas of payment fraud in your Payroll run i.e. paying one employee's salary into a "fake" or erroneous bank account of another individual.
- **ID Numbers (Verify and Validate)**
  By validating and verifying the ID Numbers on your Payroll you create complete peace of mind not only that your employee has provided a valid ID Number but also that the ID Number has been verified as belonging to the associated employee and is recorded on the Department of Home Affairs list of official ID Numbers. This eliminates both fake ID Numbers as well as ID Numbers not associated with the given employee.

Additional Services: Credit Checks and Salary EFT Payments (Chargeable):
A pre-requisite for Additional Services, is that you have our Sage Pastel Connect Module. To make use of Credit Checks and Salary EFT Payments services, you can contact Sage Pay directly on +27 861 338 338 / pastelpayroll@sagepay.co.za.

- **Salary Payments**
Salary Payments are created automatically within your Payroll System and forwarded to Sage Pay without creating the infamous "text files" which previously needed to be stored on the hard drive of your Payroll Administrator's computer and then forwarded or transferred to the authorised user of your banking software for transmission to the relevant bank. This improves efficiency and eliminates yet another potential area for Payroll fraud via the editing of the Payroll text file batch once it has been created in the Payroll and before it is imported into the banking software.

- **Credit Checks**
You will be provided with valuable information on existing and potential employees including judgements, defaults, notices / alerts, fraud listings / indicators, marital status and spouse detail, including all residential address details. Reports are sourced from the three main credit bureaus in South Africa, namely TransUnion, Experian and XDS.

Upgrade to 5in1 Payroll
(Optional Modules continued)

At an additional fee you can upgrade to Sage Pastel Payroll 5in1, including Human Resources Management, Employee Self Service, Salary Structuring, Multiple Transactions Manager and Third Party Payments. If you upgrade to Sage Pastel Payroll 5in1 you will receive 5 products for 1 price, making this a lucrative business decision. Please note that you also have the option to purchase these features individually. Subject to an annual licence fee, these features include all legislative and product upgrades, as well as telephonic and e-mail support.

Human Resources Management

- If you hire, fire or pay employees, you are already doing HR. The question is if you are doing it the right way?
- This easy-to-use HR System is suitable for any size and type of business.
- Performance Reviews and Disciplinary Actions can be done correctly and accurately. There are 66 pre-defined disciplinary reasons to choose from. You can also add any additional reasons that might apply to your business.
- The HR System ships with standard HR forms and templates that you can print and use during your HR Processing, for example a Performance Review Assessment form.

- You will receive a free employment contract template.
- With this HR System you can print a timeline of events to view all the HR processes pertaining to an employee in sequence.
- You can keep track of company assets in your employee's possession, for example company cellphone, laptop, etc.

Self Service (We host it for you)

- Self Service is a web-based self-service tool that enables employees to manage their own information online and thereby carry some of the HR administration responsibility as employees are able to make online applications for leave, loans, bursaries and travel claims.
- Employees can view their payslips and update personal information no matter where they are as long as they have an internet connection.
- Self Service makes use of workflow capabilities based on the organisation chart. This chart indicates the hierarchy and reporting structures of each department involved in the approval procedure with the administrator having sole access to create and amend the workflow structures.
- The workflow functionality is designed to provide companies, management, payroll administrators, the HR department and employees with significant benefits and advantages.
- Self Service is a hosted solution and the application sits in the Cloud, which means companies are guaranteed quick deployment at low implementation cost.
- Self Service is a secure online application using similar security as online banking vendors.
- Coming Soon: Bulk Capture allows transaction batches to be created and captured online, helping line managers / branches to submit payroll values to the payroll administrator in a batch format. Should branches need to submit their weekly wages and hours to head office for processing, the branch manager captures and submits this information online through the Self Service website synchronizing that information with our Payroll software.
- [NEW] Check it out on your smart phone ° / Go to pastelpayroll.co.za/app
- To demo Self Service online go to ess.pastelpayroll.co.za

Salary Structuring °

- Salary Structuring simplifies the task of structuring a Total-Cost-to-Company remuneration employee package, according to the employee's letter of appointment.
- By simply entering the total package value and various package components, Sage Pastel Payroll & HR will calculate the value of the remaining Cash Component and update the employee's payslip with the structure you define.
- You can also make use of the Nett-to-Gross Package calculation to accurately determine the Gross Basic Salary required to ensure the employee receives an agreed Nett Pay amount in each pay packet.

Multiple Transactions Manager

- Multiple Transactions Manager allows you to, for example, give the

Included: Telephonic and e-mail support for the first year as well as legislative and product updates.*

entire company an increase based on either a set value or a specific percentage and process a production bonus or commission by only using one screen.
- Over shutdown periods, putting your entire workforce on leave has never been this quick and easy.
- This feature allows you to make global changes to any transaction within the Payroll System to all, or a selection of employees.

Third Party Payments °°

- The Third Party Payments feature includes payments to Medical Aids, Pension Funds, Provident Funds, Garnishee Orders and Retirement Annuities.
- Any company deductions or contributions can automatically be paid over to the relevant company with the click of a button.
- No more manual capturing required with a once-off beneficiary (third party) set-up.
- You can eliminate human error and save valuable processing time as well as obtain a detailed transaction listing report per employee and party.

Sage Pastel Payroll & HR Product Range Family Tree

Product	Business environment
Sage Pastel My Payroll Online °	Start-up and small businesses (online Payroll Solution). No jargon. All you need is an internet connection. Single user, multi-company or upgrade.
Sage Pastel MicrOpay °	Start-up businesses, uncomplicated Payroll environment. Up to 5 employees (upgradeable to unlimited employees at an additional charge).** Single user, single company.
Sage Pastel Partner Payroll	Small, medium and larger businesses. From 10 employees (upgradeable to unlimited employees at an additional charge).** Single user (upgradeable), multi company.
Sage Pastel Payroll 5in1	Small, medium and larger businesses. Up to unlimited employees (dependant on your purchased employee bracket).** Single user (upgradeable).
Sage Pastel Accounting	Start-up, small to larger sized businesses. Pre-defined user-breaks.

System Requirements

	Minimum	Recommended
Workstations or Stand-alone machines		
Hardware	Pentium III 1.0GHz Processor	Pentium IV 2.0GHz Processor
Operating System	Microsoft Windows XP Service Pack 3 △	Microsoft Windows XP Service Pack 3, Vista or 7 △
Screen Resolution	1024x768	1024x768
RAM	1GB	2GB
Other	DVD-ROM	DVD-ROM, Internet Connection
Server machines (for network environments and multi-user systems)		
Hardware	Pentium IV 2.0GHz Processor	Pentium IV 3.0GHz Processor
Operating System	Microsoft Windows 2003 Server, XP Service Pack 3, Vista or 7 △	Microsoft Windows 2003 or 2008 Server △, XP Service Pack 3, Vista or 7 △
Screen Resolution	1024x768	1024x768
RAM	2GB	4GB
Other	DVD-ROM	DVD-ROM, Internet Connection

△ Microsoft Windows XP, Vista and 7 Starter and Home editions not supported