



Sage Payroll for Windows V7

Course Objectives:

This course is designed to help users gain a fundamental understanding of the Sage Payroll package. Delegates will learn how to set up the system and effectively manage the payroll from day to day and at the year-end.

Prior Knowledge Required:

No experience of working with Sage payroll is required. Delegates should be familiar with basic payroll terms but a detailed knowledge of manual payroll is not essential. A reasonable level of competence in the use of a keyboard and mouse is assumed.

Course Duration: 2 days, but course contents can be tailored if required.

Getting Started

- Overview
- The Sage Payroll Desktop
- Setting Desktop Options
- Getting Help
- Government Legislation Settings
- Setting Passwords & Access Levels

Setting Up Your Company Details

- Company Information
- Bank Details
- Coinage Requirements
- Pension Schemes
- Holiday & Absence Information
- Departments & Cost Centres
- Tax Credit Funding
- Pay Elements
- Setting up the Nominal Ledger Link

Employee Records

- Creating Employee Records
- Editing Employee Records
- Entering Employment Details
- Assigning Pay Elements
- Entering Tax Credits
- Recording Employee's Bank Details
- Viewing Payment History
- Using Criteria
- Maintaining Absences Diary
- Recording & Maintaining Car Records

Payroll Processing

- Payroll Processing Checklist
- Changing the Processing Date
- Resetting Payments
- Processing Payments, Deductions, Attachments and Tax Credits
- Processing SSP & SMP
- Processing Holiday Pay & Pension Payments
- Student Loan Payments
- Printing Pre-update Reports & Payslips
- Updating the Payroll Records
- Posting Through the Nominal Link
- Processing Leavers
- Printing the P32 Employers Summary Report

Payroll Year End

- Year End Checklist
- The Tax Year End Wizard
- Printing Year End Statutory Forms
- Advancing the Absence & Holiday Year

Data Management

- Backing Up Data
- Restoring Data

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