



Cleary
Training
Associates



Customised IT Training & Development

Course Outline | Sage Payroll Level 1

Duration: 1 Day

Objectives: Delegates will learn how to add and amend employee details, to apply the appropriate rates and to process weekly/monthly salaries.

Prerequisites: A basic understanding of using PC's, a keyboard and a mouse, plus knowledge of basic payroll procedures

Getting Started

- Starting Sage Payroll
- The main program window, the tree view
- Exiting Sage Payroll
- Backing up and restoring data
- Payroll basics
- Month end

Company Settings

- Company details
- Bank & coinage
- Tax funding
- SSP/SMP funding
- IR payments

Company Preferences

- Entering a pension scheme
- Pension scheme details
- Pay elements
- Employee & employer contribution

Employees

- Adding, updating employee personal details
- Adding employment details
- Changing rates of pay
- Entering Year-To-Date values

Processing Monthly Payroll

- Processing date
- Entering payments
- Pre-update reports
- Updating records

Other Payments

- Salaries calculated on an hourly basis
- Manual SSP calculations
- A new weekly paid employee
- Process & update: month 12/week 52
- Process & update: week 53
- Employee leaves
- Payment by BACS

Reports

- Employee
- Company
- Legislation

Year End

- Pre year-end tasks
- Year-end wizard: P11, P14, P60, P35
- Clearing the tax year
- Updating employee records
- Backing up data