

# Sage Business Cloud Payroll

# Manage Accounts

Sage Business Cloud Payroll provides many tools for customers to manage their account information. These tools provide customers the ability to update contact details, view the account/billing type and invoices.

Follow the steps below to access Manage Accounts features in Sage Business Cloud Payroll.

# Manage Accounts Screen

Login to your Sage Business Cloud product:

• Open an existing company

sage   Payroll		
Select Account	00E Ltast	Add Custo
W01634   Madeleen	005   test	Add Cycle
W34140   Test	Feb Test Final - Period ending 30 September 2018 Tax year: 1 March 2018 - 28 February 2019 Pay Cycle: Monthly Tax on Period Period Number:	Show Cycle
	Salaries - Period ending 31 December 2017 Tax year: 1 March 2017 - 28 February 2018 Pay Cycle: Monthly Take On Period Period Number:	Show Cycle
	Test Feb - Period ending 31 March 2019 Tax year: 1 March 2019 - 29 February 2020 Pay Cycle: Monthly Period Number:	Show Cycle

• The below dashboard will display

y Dashboard								
Support Notifications	Employees	Ma	rch 20	119				
🕽 15 Apr 19 🗙 🔺		Su	Mo	Tu	We	Th	Fr	S
scheduled Maintenance	1 0	24	25	26		28	1	
Ve will be doing some quick maintenance on Sage								-
'ayroll tomorrow evening, 16 April 2019 at 19000.		3	4	5	0	7	8	
We won't keep you from enjoying your payroll any longer		10	11	12	13	14	15	
nan that.	active terminated					_		-
01 Apr 19 ×	active	17	18	19	20	21	22	
2018/2019 Filing Season		24	25	26	27	28	29	
ARS is upgrading their information technology (IT)	+ Add new employee							-
ystems and migrating to a new platform between 12		31	1	2		4		
and 16 April 2019. You may experience intermittent								_
f you require any assistance in this time, you can go to	This Month							
iny SARS branch or contact the SARS Call Centre.								
he annual reconciliation submission period will open on	Current Period							



- Select on the username displayed on the top right-hand corner of the screen.
- Click on the Manage Accounts tab

Су	Change your Profile and Manage Accounts	Made	eleen Jan	se v Rens	sburg 👻	?	$\triangleright$	111			
Тах	Use My Profile for changing your Display Name, Email Address or Password. You can also view all the clients you are linked to from		🔺 My F Manage	Profile e Account	ts		I				
	also view all the clients you are linked to from here. Manage Accounts is where you can view the current accounts details, Invoices and grant Support accounts details, Invoices and grant		Sign O	ut							
		March 2019									
		Su	Мо	Tu	We	Th	Fr	Sa			
		24	25	26	27	28	1	2			

• These steps will open the manage accounts screen

sage   Pa	iyroll	Company 🔻	Employee	•	Payroll 🔹	Leave	<ul> <li>Accord</li> </ul>
Manage	Accounts	6					
Account details	Subscription de	etails In	voice details		Support		
W01634 -	Madeleen						
The invoice	will be issued to a	Person		•	which is	Not Register	red
The name of	of the person that th	ne invoice mu	ist be issued	to is	Madelee	n	,
Please sup	ply an order numbe	er, if applicabl	e				
Referral coo	de						

#### Account Details Tab

On the account details tab, you will have the ability to update any account or contact information for the user.

It is very important to ensure the information presented on this Account details screen is valid and up to date to ensure that important system and billing information gets sent to the correct user.



# **Subscription Details Tab**

The subscription detail tab allows you to view when your account was started and the Account type/billing model that has been applied to your Sage Business Cloud Payroll account.

sage	Payroll	Company 👻	Employee 💌	Payroll 🔻	Leave 🔻	Accounting 👻	Reports	UIF Declaration	Tax Certificates	More 👻
Mar	age Accou	nts								
Accoun	details Subscription	on details	Invoice details	Support						
W01	634 - Madeleen									Cancel Account
Sta	t Date		2011/11/11							
Acc	ount Type		SlidingScale							

- There are different Subscription Types /Billing Models:
  - o Sliding Scale: Billing per payslip processed
  - Monthly Subscription: A monthly amount billed according to the agreed upon employee bracket
  - Annual subscription: An annual amount billed according to the agreed upon employee bracket
  - o Accountants: Billed according to advisor

If the billing model is Subscription based (Monthly or Annual) customers can upgrade or downgrade the Employee Bracket where needed by changing the current Employee Bracket to a higher or lower bracket and selecting the Request button.

Research dubally	C. Assessed as distants	Inclusion data de	
Account details	Subscription details	invoice deutes Suppon	
Z00004 - G	ST Construction		
Start Date		2018/02/08	
Subscription T	ypė	Fixed Bracket subscription	billing
Employee Bra	sket	16 - 2 <b>0</b>	
Amount Payab	le Per Month	R 444.00	
Amount Payab	ie eer Month	K 444.00	



• The Cancel accounts button can be used

If you no longer require the use of Sage Business Cloud Payroll the Cancel button allows you to de-activate your account.

This option will stop the use of the application and will stop the billing process. Please note all invoices due before this option is clicked will still be due for payment



# **Invoice Details Tab**

The invoice tab provides detail into the invoices and credit notes that have been issued. It also provides the user with the correct bank details and Reference to use when making Payment

age Payroll Company	Employee - Payroll -	Leave - Accounting -	Reports UIF Declarati	on Tax Certificates Mor	e <del>v</del>		
Manage Accounts							
Account details Subscription details	Invoice details Support						
W01634 - Madeleen							
<ul> <li>Payment Details</li> </ul>							
Payment Reference Number: W01634							
Banking Details							
Sage South Africa (Pty) Ltd							
Nedbank Hatfield							
198 765							
16 02 073 910							
Email address for account queries: account	s@payroll.sageone.co.za						
<ul> <li>Unpaid Invoice Details</li> </ul>							
Short Description Descrip	tion Qty	Unit Price	Amount	Company Name	Number	Month	Year
Short Description Descrip	tion Qty	Unit Price	Amount	Company Name	Number	Month	Year

In the Unpaid and Paid invoice details sections a user can determine what invoices are due and which invoices still require payment

•	✓ Unpaid Invoice Details										
	Short Description	Description	Qty	Unit Price	Amount	Company Name	Number	Month	Year		
-	Paid Invoice Details										
	Short Description	Description	Qty	Unit Price	Amount	Company Name	Number	Month	Year		



### **Payment details**



To ensure the payment of your account is reflected correctly please ensure that the correct bank account details are used with your site codes as reference. Send your Proof of Payment to: accounts@payroll.sageone.co.za

Reference: Your Site Code

Bank detail:

Sage South Africa (Pty) Ltd

Nedbank

Branch: 198765

Acc No: 1602073910

Swift Code : NEDSZAJJ

