DATAFILE
software

this issue

Welcome

Welcome to the October newsletter for reseller partners of Datafile Software.

If you have any suggestions for issues you would like to see covered in future newsletters please contact the team via the email address below.

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Datafile Software and Datafile Software Support Ltd

I am pleased to announce that the Share Capital of Datafile Software Support Limited and the Software Business of Datafile Software Limited was acquired by myself and Michael Blatherwick on 30th. August 2013.

Michael and I have worked together since 1993 when we formed Sense Computer Systems Limited. Sense went on to become one of Datafile's largest Partners.

We are both firm believers that Datafile's attributes set it apart from its peers and both of us are looking forward to taking the Datafile product range, our partners and users forward together.

We are also pleased that Steve Ashcroft, the original author of the software, will remain with the business to provide consultancy services. All other key staff members are staying with the business and we will continue to operate as normal from our Tarleton offices.

In the meantime, work continues on our new version and our objectives remain to grow the business further with new products and strategic partnerships with complementary products.

In the short term, the business will be trading as Datafile Software Support Limited but this name will change to Datafile Software Solutions Limited over the next few weeks and will be our sole trading company.

The web and email hosting aspect of our business has been transferred to Ashdata Limited who are a Web Consultancy business owned by Steve Ashcroft.

Hosting continues unchanged until renewal at which point your next renewal invoice will be issued by Ashdata Limited.

The web team from Ashdata Limited will contact you shortly with regards any developments you are looking to make or queries you may have. If you wish to contact them in the meantime to discuss your requirements then you can contact Ashdata Limited on 01772 280 038 or email websupport@ashdata.com

If you have any questions or concerns then please give me a call.

Terry Moore
Managing Director

Pension Auto-Enrolment

Automatic Enrolment – What is it?

The government has introduced a new law to make it easier for people to save for their retirement. It requires all employers to enrol their workers into a qualifying workplace scheme if they are not already in one.

At present, many workers fail to take up valuable pension benefits because they do not make an application to join their employer's scheme. Automatic enrolment is meant to overcome this.

Does this affect me?

Employers have to automatically enrol workers who:

- Are not already in a qualifying workplace pension scheme;
- Are at least 22 years old;
- Are below state pension age;
- Earn more than £8,105 a year; and
- Work or ordinarily work in the UK (under their contract)

However, even if employees do not qualify to be automatically enrolled, they still have the right to join the scheme. If your employee tells you that they would like to opt in to the scheme, you must allow them to do so.

When is this happening?

Automatic enrolment began on 1 October 2012 for very large employers, smaller employers' will be required to introduce a pension scheme gradually over the following five years, based on the employer's size.

Click the link below to visit the Pensions Regulator's website to see the staging dates for employers.

http://www.thepensionsregulator.gov.uk/employers/tools/staging-date.aspx

Datafile and Auto-Enrolment

Generally enrolment within pensions is a HR driven process rather than a payroll process – the Datafile Payroll system needs to be advised of the contributions to make for each employee (percentage based / fixed amounts etc..) , the earnings that pensions are calculated on and how contributions are to be treated for tax purposes but deciding which employees are eligible and the rates to deduct is outside the scope of the Datafile payroll system.

There may be changes you wish to make within Datafile, however, to assist in the management of pension enrolment.

You may wish to consider for example adding extra items on your employee record to hold data relating to an Employee's Age, Employee Classification for Auto-Enrolment, Pension Scheme Titles, Start Dates, Opt Out Dates etc.

Record Keeping

The Ledger Enquiry and CRM facilities available for the Employee file allow you to use the SCANS option tools to record copies of any opt-in, joining or opt-out notices.

You can also use the Microsoft Word template options to prepare information to give to your employees based on templates provided by your company pension scheme manager.

The P11 transaction file can also be used to record the employee pension contributions. Contribution details can then be reported via a P11 listing or statement print as required.

Pension Contribution Options

In the Datafile Payroll application there are three options available for pension contributions and employees may be set to use any of these options.

Company Pension Scheme – payroll system profiles allows you to define the a global scheme setting (whether contributions are calculated based on Basic% or Gross%, whether contributions are tax deductible and so on). Against each employee you then set the contribution levels for the employee and employer. You have one scheme setting per payroll company.

Stakeholder Pension Scheme – if using the stakeholder scheme then options are available within the PENS option in Employee Maintenance to set contribution calculations and values. Note that Stakeholder contributions are always a deduction after tax.

Switches – employee contributions can be set as a deduction switch. Traditionally used for AVC's you may use these where your pension scheme provides you with the values to deduct from your employee.

Which option is suitable for your chosen pension scheme depends on the scheme requirements and what existing pension options you allow. You should discuss this with your pension provider.

For an expanded version of this article published earlier in the year with more information on extra items you may wish to add to you employee database to assist in managing pension enrolments please visit the knowledgebase article on the Datafile website.

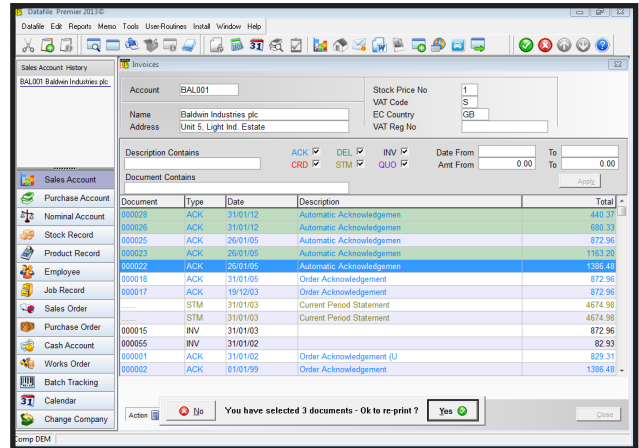http://datafile.co.uk/kb/article.php?id=2098

Release 6.7

Release 6.7—the next update for the current Datafile version—is nearing its release date later this month. Some of the features available with this update are documented below.

Multiple Invoice Reprint / Email

The Ledger Enquiry tools for the Sales Ledger allow you to view, reprint and email invoice documents on request. However, you may often be asked to email multiple invoices and this required you to send each invoice as a separate email.

New in Release 6.7 is the facility to tag multiple documents for a customer and send as one email with separate PDF attachments for each document.

A SELECT button is available on the Invoices list which highlights the current document and you scroll though clicking this button as required. Once all required documents are selected you can choose the PRINT button to print/email the selected documents.

Save Period End Reports

As you run the Period End for the Sales, Purchase and Stock ledgers you often print a series of reports and a 'Automatic Period End Reports' option is available that allows you to run a selection of the system reports as one procedure.

Many users elect not to print these files but instead to Spool them for later print or enquiry—sometimes creating user-id's specifically so the spool files are not against general operational id's. Spool files are in a proprietary Datafile format so are not easily transferable and so you are often required to print these to, for example, supply to your accountants for year-end audit requirements.

This new option allows the Period End Reports to be saved as PDF's to a set folder—with separate sub-folders for each company, application and period—instead of, or as well as, printing to spool or print device.

In addition the general application reports will also include similar facilities to save a copy of the report as a PDF into a similar folder structure at the same time as printing or spooling a report — allowing you to save, for example, a Nominal Trial Balance report or a Cashbook Bank Statement.

Stock Images on Bill of Materials Documents

This new facility allows the ability to print Stock Images for the finished item or components on your Bill of Materials build and picking documents.

This could be used to include images of the components to assist in selection or include schematic information for assistance with the build of the finished item.