

# COMPREHENSIVE PAYROLL AND PERSONNEL MANAGEMENT | palk365.ee

The best choice for companies looking for a comprehensive payroll and personnel accounting solution.

- ❖ All the information about the company is contained in **one solution and is accessible to everyone entitled to use it.**
- ❖ Allows users to read data from different modules; for example, sales-based performance rewards, calculations of cost limits (cost overruns), time spent on projects, service hours of maintenance technicians from the maintenance module, etc.
- ❖ It is possible to assign responsible persons to the fixed assets, by automatically creating a resource, vendor and salesperson with data from the personnel system.
- ❖ **Scheduling, monitoring and correcting timesheets is done in the same system as the payroll and personnel accounting.**



Microsoft Dynamics 365  
Business Central

A Platform for the Future

## Customer-specific solutions

- ❖ According to the specific operations of the company, there may be a need to use different pay schemes. Our standard package includes pre-set solutions that can be customised by the client (tax rates, formulas for different calculations, salary analyses, national reports).
- ❖ Enables data imports from Excel.
- ❖ Interfaces with external programs and web solutions.
- ❖ Convenient customised solutions are available for clients. Our most innovative special solutions for improving accounting efficiency are developed in cooperation with the client.

## FUNCTIONALITIES OF DIFFERENT PACKAGES

		PAYROLL 365	PERSONNEL365
STRUCTURE	<i>The structure describes the different management levels in the company. The solution allows you to configure up to four levels of structural trees, as well as to assign positions, specify the number of jobs and the workload at each level. The level of each structure can be linked to the type of cost label or dimension described in the financial system used for payroll management.</i>	x	x
EMPLOYEE CARDS	<i>The employee card status (active, passive, left, prospective) can be accessed, as well as automatic administration of the pension scheme membership based on a personal identification code. Information about the employee's children and documents can be added, while the employee information entered into the system on a predefined contract bases can be printed. A photo and various attachments can be added to the employee card. Supplier, resource and salesperson cards are automatically created from the employee card.</i>	x	x
ABSENCES AND VACATION SCHEDULES	<i>There are user configurable types of absences and controls for entering overlapping absences, either as a warning or as a prohibition. A vacation schedule can be created by registering the planned vacations in the vacation schedule as actual vacations. Substitutes can be appointed during vacations, and there are monthly vacation balance calculations. There is the registration of continued sick-leave, as well as the linking of state-compensated absences to the data about children. Vacations may also be cancelled.</i>	x	x

# FUNCTIONALITIES OF DIFFERENT PACKAGES

<b>TIMESHEETS</b>	<i>The timesheet settings define the working times. Working hours are recorded by different cost categories, while absences are registered from the timesheets. Planning of working hours and managing actual working hours can be performed, as well as the comparison of entrance logs and working hours, transferring the worked times to the payroll system, aggregated timekeeping and the archiving of timesheets. Different printouts of timesheets are possible – by the type of week, month and expense, by workers not included in the working time schedule, etc.</i>	<b>x</b>	<b>x</b>
<b>PROJECT-BASED TIMESHEETS</b>	<i>These settings define the persons responsible for filling in and confirming the project-based timesheets. They can fill in the employees' timesheets in the employee's portal and submit the table to the project manager for approval. Templates can be configured for confirming and rejecting the timesheets. The hours worked, which are confirmed by the project manager, are automatically displayed in overall timesheets, where they are registered as the basis for the payroll.</i>		<b>x</b>
<b>PAYROLL</b>	<i>In addition to the standard formulas for calculating wages, the user can create different formulas that meet the needs of the company. Tax calculations include the calculation of the minimum social tax rate and the social tax allowance for employees on disability pensions. Pay notifications will be sent to all the employees at one time or to one employee's email. The calculated amounts are transferred to the general ledger accounts by cost categories as individual or aggregated entries. The costs are allocated by weight to the different cost categories before their entry in the ledger. It is possible to create a file for importing the payroll information into the ledger in SAP, iScala or any other program.</i>	<b>x</b>	<b>x</b>
<b>CALENDAR NOTIFICATIONS</b>	<i>This setting determines the frequency of issuing calendar notifications and the persons to whom the notification shall be sent. Notifications are sent in the event of public holidays, a birthday, name day, anniversary, retirement, recruitment, departure from work, start of a probation period, end of a probation period, start of vacation, end of vacation, medical examination, expiration of a document, or payment of vacation pay. Summary notifications may also be sent.</i>	<b>x</b>	<b>x</b>
<b>TRAINING</b>	<i>There are user-configurable training types, areas and costs. The training includes card-based information management by the training participants, managing the training costs, and linking the training to skills and documents.</i>		<b>x</b>
<b>OCCUPATIONAL HEALTH</b>	<i>Data on the times and results of the medical examination is entered onto the employee health record card. Information about occupational accidents, occupational diseases and work environment commissioners is also managed.</i>		<b>x</b>
<b>EMPLOYEE ASSETS</b>	<i>An integrated list of the employee assets is created. It is also possible to keep records of the fixed assets and small equipment assigned to the employee, which are not tied to the fixed assets module, as well as to create tour pages and instruments to record the delivery and receipt.</i>		<b>x</b>
<b>EDUCATION OF THE EMPLOYEE</b>	<i>Pre-set levels of education and educational institutions allow you to enter information quickly and conveniently about an employee's ongoing or already acquired education.</i>	<b>x</b>	<b>x</b>
<b>SKILLS AND PREVIOUS WORK EXPERIENCE OF THE EMPLOYEE</b>	<i>User configurable skill types, skills and skill levels, according to a specified type, allow you to enter and manage information about the different competencies of employees. It is possible to keep track of the employee's previous work experience.</i>		<b>x</b>
<b>INSIDERS AND RELATED PERSONS</b>	<i>This solution offers the administration of persons and companies related to the employee. An employee may be appointed as an insider of the company for a job or for some other reason, and the submitting and editing of insider data is possible from the employee portal.</i>		<b>x</b>
<b>CLAIMS</b>	<i>There is automatic administration of bailiffs and other debt claims. It is possible to set a priority order for withholding, the amount or percentage remaining to the employee and the amount withheld from pay. The payment description is configurable and a payment file can be created to transfer the withheld payment to third parties.</i>		<b>x</b>
<b>EMPLOYEE AND MANAGER PORTAL</b>	<i>The data and data fields displayed in the portal are user configurable. An employee can view his/her data, in order to apply for tax-free income and to modify, add or delete the data. There is a separate view of the subordinate's data for the manager and of the employee data for the other employees. In addition, there is the possibility to display notifications.</i>		<b>x</b>
<b>EMPLOYEE FILE MANAGEMENT</b>	<i>Employee-related files can be added from different cards and lists. The attached files are displayed and can be filtered/sorted both on an employee basis and as a single file list for all employees.</i>	<b>x</b>	<b>x</b>
<b>REPORTING</b>	<i>National reports and the reports of Statistics Estonia can be accessed, as well as user-generated pay analyses, employee, salary and absence reports and different listings by the company. The companies in the group can view different lists available to all companies.</i>	<b>x</b>	<b>x</b>
<b>AUTOMATIC EXCHANGES OF INFORMATION WITH THE STATE (X-TEE)</b>	<i>Inquiries and the registration of sick leave are the basis for payroll calculations. Sick leave information is sent to the Health Insurance Fund and to the Employee Registration in TÕR. The solution requires the existence of an X-TEE security server.</i>		<b>x</b>
<b>VACATION BALANCES</b>	<i>Different types of vacation balance queries are available based on the date. It is possible for the user to set the formulas to display balances by the type of vacation.</i>		<b>x</b>
<b>PROTECTION OF PERSONAL DATA</b>	<i>Logs for viewing, editing and deleting the data about an employee. The user can configure different data deletion packages, or create a printout of the data about the employee.</i>	<b>x</b>	<b>x</b>
<b>INTERFACE WITH WEB-BASED SOLUTIONS</b>	<i>Somno vacation management; SatffLogic time and personnel management.</i>	<b>x</b>	<b>x</b>