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Managing Director: T. Webster

End User Training Curriculum Sage Pastel Payroll & HR Training

By completing the five 1 day Sage Pastel Payroll & HR training courses within a 6 month period and obtaining the Sage Pastel Payroll & HR Administrator Certification (by writing your assessment) you will have all the knowledge and skills you need to process your payroll effectively and efficiently in order for your business to get the optimal return from your payroll software.

Entrance Requirements

Learners need to meet the following prerequisites before attending this course:

Grade 10 literacy, numeracy and computer literacy

Training

Each Payroll Module is a one day course (5 days in total). You may choose which modules you would like to attend – it is not compulsory to attend the full 5 days.

Course Outlines

Module 1 of 5: Payroll Legislation Training

Everything you need to know about effectively running a compliant payroll office.

- The A to Z on effectively running the payroll office
- All you need to know about the Acts that govern payroll
- Company policy and the responsibility of the payroll administrator
- Termination procedures
- Reconciling tax and performing your own payroll audit

Please note this module encompasses only the theory (legislation) and not the practical system application

Duration: 1 day



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Module 2 of 5: Basic Software (Level 1) Training

A fundamental course for every Sage Pastel Payroll & HR user!

- How to create your payroll company and ensuring that it is set up correctly the first time round
- How to create and link cost centres, pay points, job codes and occupations
- How to create employees and maintaining employee data
- Setting up, adjusting and processing of leave and leave taken
- How to set up a payslip for an employee and ensuring that all the statutory transactions are entered
- Capturing overtime and other additional payment information
- Understanding and changing transactions to suit specific processing requirements
- Setting up and processing electronic bank transfers (EFTs)
- How to print the payslips
- Which reports to print at month end
- How to amend a payslip in the event that a mistake was made
- Making back-ups of your payroll information
- Updating into a new pay period and closing off a month successfully

Duration: 1 day

Module 3 of 5: Advanced Software (Level 2) Training

Ensure that you utilise Sage Pastel Payroll & HR to its full potential

- Easily import and export information
- Protect your payroll information by setting up user access rights and passwords
- Create new transaction templates and formulae for powerful and complex incentive or allowance calculations
- How to set up new rates for specialized shift allowances and specific overtime requirements
- Utilising the Batch Transactions facility for multiple transaction input on a single screen i.e. commissions and overtime
- Printing reports for previous periods
- Learn how to use the powerful Multiple transaction Manager to affect global transaction changes over multiple selections of employees

Duration: 1 day



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Module 4 of 5: Payroll Tax Training

Are you taxing your employees correctly?

- Legislative requirements made simple and explained in detail
- Fringe benefits and tax calculations made simple
- Understand the factors that influence the tax calculation
- Correctly applying directives
- How to tax temporary or part-time employees
- Calculating tax correctly, the simple way
- Correctly calculating tax on an annual bonus or irregular payments
- How to accommodate and calculate travel allowances

Duration: 1 day

Module 5 of 5: Problem Solving

Simple steps on how to become a payroll do-it-yourself expert. This comprehensive and practical workshop will provide you with extensive problem solving techniques in respect of:

Payroll Tax

- Identifying tax discrepancies
- Evaluating payroll tax parameters
- Payroll tax tips for the do-it-yourself expert

Leave

- How to make leave adjustments
- Loading year to date leave information

Payroll Reporting

- How to utilise payroll reports for problem solving purposes
- Using the monthly analysis report for payroll auditing purposes

Backups

- Common mistakes while making backups
- How to successfully restore a backup

Duration: 1 day