



RECRUITMENT  
FUNDING SOLUTIONS



# Agency Portal User Guide





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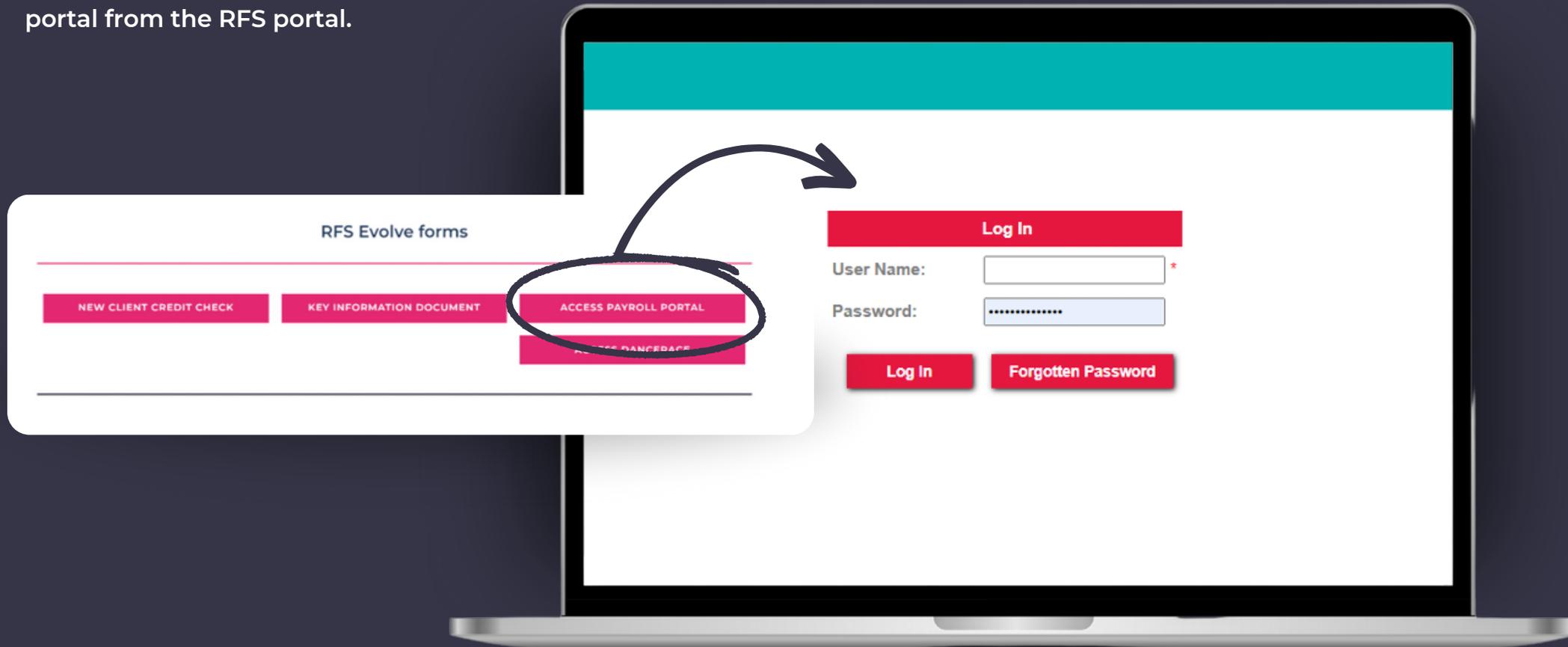
RECRUITMENT  
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# Logging in to your agency portal



## Logging in to your agency portal

You can click on the Access payroll portal from the RFS portal.





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# Setting up new workers



## Setting up new workers

Please note - Clients and suppliers (payroll company/ltd company) need to be set up before you can set up the workers and do the assignments.

new worker' is shown, with 'new worker' circled in red."/>

Home : Find Worker

Workers

Suppliers

Clients

Assignments

Weekly Assignments

Refine Your Search

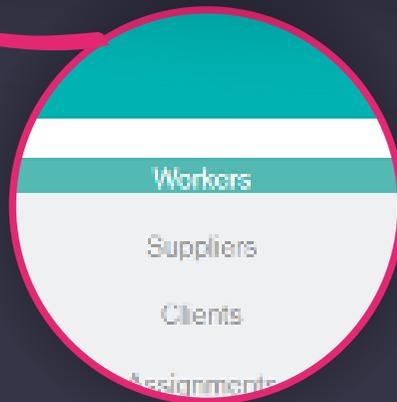
Surname  Forename  Personnel Ref  Date Of Birth  Postcode

NI Number  Logon Ref  Supplier Ref

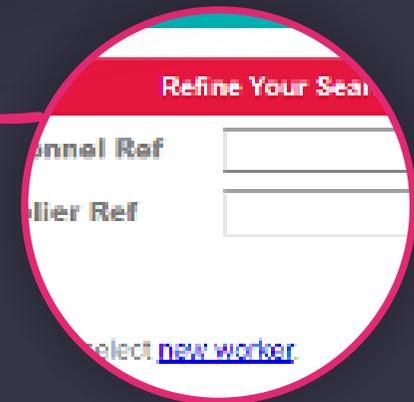
Search

Please select Personnel Ref of the worker you would like to view. If the worker record does not exist then select [new worker](#)

Go to workers on the top left of the screen.



Select new worker.





## Setting up new workers

This will open a blank worker page.  
Fill out the following fields:

- 1 Select the consultant and the payroll group
- 2 Department
- 3 Gender
- 4 Title
- 5 Forename and surname
- 6 Two lines of address and Postcode
- 7 For PAYE you MUST have NI number
- 8 DOB

Worker Wizard Step A

1 Consultant *	(1000 )D Male	Agency Name *	-- Please Select --
Payroll Group *	DW Recruit Test	Employment Type *	-- Please Select --
2 Department *	-- Please Select --		
3 Gender *	-- Please Select --		
4 Title			
5 Forename *		5 Surname *	
Second Name		Third Name	
Known As			
6 Address *		Phone	
Address Line 2 *		Work Phone	
		Work Fax	
		Mobile Phone	
		Email Address	
6 Postcode *		Country	
8 Date Of Birth *		7 NI Number	
Payslip Print Method *	-- Please Select --	AWR Type	-- Please Select --
Engagement Status	-- Please Select --	UTR Non CIS	

Next



## Setting up new workers

- 9 Payslip method is always electronic
- 10 Engagement status: leave blank
- 11 Agency name
- 12 Employment type: if paying on your PAYE ref – PAYE, if UMB or CIS it is always Umbrella
- 13 Mobile number
- 14 Email address
- 15 NI number
- 16 AWR is parity if paying PAYE – UMB and CIS is excluded

→ Click complete

If paying PAYE please tick the correct starting declaration and student loan information for the worker.

→ Click next

The screenshot shows the 'Worker Wizard Step A' form. The fields are organized into two columns. The left column includes: Consultant (dropdown: (1000 )D Male), Payroll Group (dropdown: DW Recruit Test), Department (dropdown: -- Please Select --), Gender (dropdown: -- Please Select --), Title (text input), Forename (text input), Second Name (text input), Known As (text input), Address (text input), Address Line 2 (text input), Postcode (text input), Date Of Birth (text input with calendar icon), Payslip Print Method (dropdown: -- Please Select --), and Engagement Status (dropdown: -- Please Select --). The right column includes: Agency Name (dropdown: -- Please Select --), Employment Type (dropdown: -- Please Select --), Surname (text input), Third Name (text input), Phone (text input), Work Phone (text input), Work Fax (text input), Mobile Phone (text input), Email Address (text input), Country (dropdown: -- Please Select --), NI Number (text input), AWR Type (dropdown: -- Please Select --), and UTR Non CIS (text input). A blue 'Next' button is located at the bottom left of the form area and is circled in red. Red numbered callouts (9-16) point to specific fields: 9 to Payslip Print Method, 10 to Engagement Status, 11 to Agency Name, 12 to Employment Type, 13 to Mobile Phone, 14 to Email Address, 15 to NI Number, and 16 to AWR Type.



## Setting up new workers

- 1 Complete bank details payment method will be BACS
  - 2 Start date: Todays date
  - 3 If paying umbrella or CIS now select your payroll supplier
- Click complete

Details 2 doesn't need to be completed unless you want to keep a record of this information.

**i** Bank details for umbrella and CIS are not needed.

**i** *\*\* if your client is going to use the online timesheets portal go to online details to set up the worker online portal*

→ Select menu template – depending on how they are being paid – UMB, PAYE, Ltd

**i** If manual timesheets no online portal needed for the worker so don't need to do the online details.

Worker Wizard Step C

Exclude From WTR

1 Payment Method

Account Type  Bank  Building Society

Account Holder Name \*

Bank Name

Sort Code \*

Account Number \*

Roll Number

Bank Address

2 Start Date \*

**Complete**

Home Find Worker Worker Online Information

John Smith

<a href="#">Worker Details</a>	Payroll Group	PIER Ltd (PIER)	Personnel Ref	PIER.0003
<a href="#">Details 2</a>	Forename	John	Surname	Smith
<a href="#">Bank Details</a>	Address	123 madcup lane	Phone	
<a href="#">Payroll History</a>		made up town	Work Phone	
<a href="#">Worker Timesheet History</a>			Mobile Phone	01234567891
<a href="#">Select History</a>			Email Address	gma4@gmail.com
<a href="#">Schedule History</a>				
<a href="#">Detail Entry</a>	Postcode	AB12 3CD		
<a href="#">Add Worker</a>				
<a href="#">WTR Information</a>	User Logon *	<input type="text"/>		
<a href="#">Online Details</a>	Menu Template *	-- Please Select --		
<a href="#">Umbrella Timesheets</a>				
<a href="#">Queries</a>				

**Create Logon**



## Assignments for workers

Once the worker has been set up you need to create the assignment for the worker.

If there is no assignment the worker won't pull through on payroll.

Home - Find Assignments

Workers  
Suppliers  
Clients  
**Assignments**  
Weekly Assignments  
New Assignment  
Timesheets

Refine Your Search

Assignment Ref  Personnel Ref   
Worker Forename  Worker Surname   
Client Ref  Client Name   
Start Date  End Date

Search

Please select assignment Ref of the assignment you would like to view. If the assignment record does not exist then select [new assignment](#)

Suppliers  
Clients  
**Assignments**  
Weekly Assignments  
New Assignment

Go to assignment on the left hand side.



## Assignments for workers

- 1 Select the consultant
- 2 Agency name
- 3 Department
- 4 Workers surname - Click on the 3 '...' to find your worker this will populate the workers details.
- 5 Client name – click on the 3 '...' to find the client they are working for.
- 6 If this client has a PO number for the full assignment you can add it in here, if not you can leave blank.
- 7 Start date and end date need to be entered.
- 8 Job category – click on the 3 '...' and find the job title for the worker.
- 9 If PAYE paid, click the 'subject to PAYE' tick box.

Home : New Assignment

Create a new Assignment by entering the following data and submit, which will allow you to complete the associated Pay and Bill rates.

Entered By Donna Male

1 Consultant \* (1000 )D Male

2 Agency Name \* -- Please Select --

3 Department \* -- Please Select --

4 Worker's Surname ...

Worker's Forename

Personnel Ref \*

5 Client Name \* ...

Contact Name

6 Purchase Order

7 Start Date \*

8 End Date \*

9 Job Category \* ...

Job Description \*

Location

Cost Centre

9 Public Sector & Subject To PAYE

Holiday Entitlement

Basic Weeks Per Annum

Hourly Rate %

Prev Service (Wks)

Submit

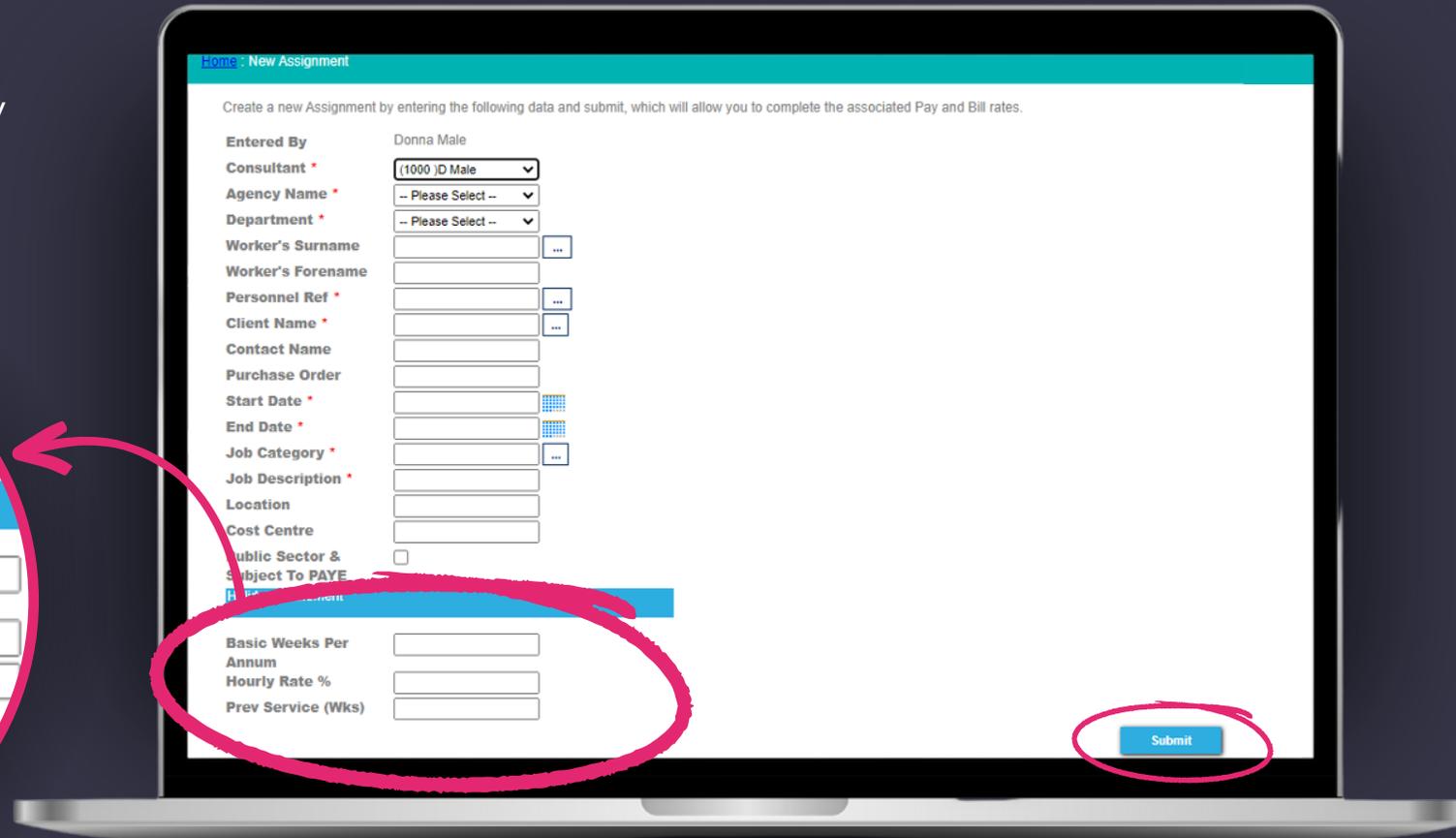
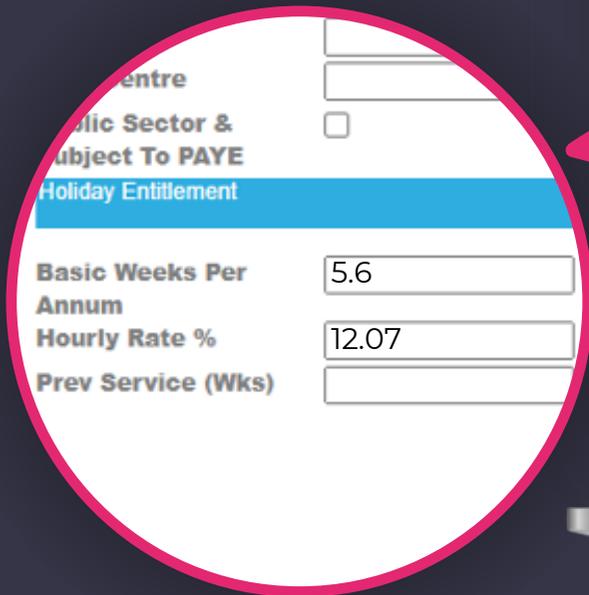


## Assignments for workers

Holiday entitlement – if paying PAYE:

Basic weeks holiday is 5.6 and the hourly rate is 12.07%

Click 'submit'



**\*\*we would strongly recommend using a Contract for services set of terms for your PAYE workers.**



## Assignments for workers

The next page is where you will put the workers' pay and charge rates in.

Key in the Pay and Bill rates to include with this Assignment.  
Having entered all the appropriate pay and bill rates click on the Complete button.

Rates	Frequency	WTR	AWR	Pay Rate	Bill Rate	VAT Code	
BASIC RATE	Hourly	<input checked="" type="checkbox"/>	<input type="checkbox"/>	13.50	20.00	Standard 20.00%	
Overtime Rate 1	Hourly	<input checked="" type="checkbox"/>	<input type="checkbox"/>	15.50	22.50	Standard 20.00%	
<input type="text" value="-- Please Select --"/>	<input type="text" value="-- Please Select --"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Standard 20.00%"/>	<input type="button" value="Insert"/>

Select the pay rate description input the pay and charge rate then click insert.

If you have more than 1 basic rate you can now put in any overtime rates.

Click complete



## Weekly assignments

It is important to note that you must put as accurate as possible to start and end dates of the assignment in for each worker.

This will allow you to run a weekly assignment report to see which workers have submitted a timesheet.

This report can be ran by clicking on weekly assignments on the left hand side.

Red **XX** means no online timesheet has been created .

If you have only 1 red **X** it means the timesheet is awaiting online signature from the end client.

Home : Weekly Assignments

Assignments for the current week are shown below and those without a timesheet for the current week have the assignment Ref shown in red. Click on Assignment Ref to view details.

Refine Your Search

Agency Name: XYD Department: -- Please Select -- First Sort: -- Please Select -- Second Sort: -- Please Select --

Surname: Forename: Client Name: Begin Date:

Search

Assignments Ending After The 09/02/2022 Are Shown.

Records 1 To 17 Of 17

Assignment Ref	Status	Worker Name (Ref)	Client	Start Date	End Date
<b>XYD /10</b>	Unknown	<a href="#">Copy Assn</a> <b>XX</b> Marge Simpson (XYDWR/0002)	TheSimpsons (XYDWR00002)	28/02/2021	22/03/2023(E)
<b>XYD /4</b>	Unknown	<a href="#">Copy Assn</a> <b>XX</b> Homer Simpson (XYDWR/0001)	TheSimpsons (XYDWR00002)	07/03/2021	30/03/2023(E)
<b>XYD /6</b>	Unknown	<a href="#">Copy Assn</a> <b>XX</b> Homer Simpson (XYDWR/0001)	TheSimpsons (XYDWR00002)	07/03/2021	07/03/2023(E)
<b>XYD /8</b>	Unknown	<a href="#">Copy Assn</a> <b>XX</b> Daniel Bell (XY7505)	TheSimpsons (XYDWR00002)	07/03/2021	14/03/2022(E)
<b>XY00000001</b>	Unknown	<a href="#">Copy Assn</a> Create TS Kieran Gill (XY14396)	XY G&D Scaffolding Limited (XYGDS)	25/01/2022	25/03/2022(E)
<b>XY00000003</b>	Unknown	<a href="#">Copy Assn</a> Create TS Kevin Gallacher (XY14170)	XY G2 INTERIORS LTD (XYGIL)	17/01/2022	17/04/2022(E)
<b>XY00000002</b>	Unknown	<a href="#">Copy Assn</a> Create TS Arthur McGill (XY13717)	XY Thomson Pettie Limited (XYTHO)	16/11/2021	21/03/2022(E)
<b>XYD /7</b>	Unknown	<a href="#">Copy Assn</a> Create TS George Calder (4)	XY Thomson Pettie Limited (XYTHO)	30/01/2022	31/03/2022(E)
<b>XYD /9</b>	Unknown	<a href="#">Copy Assn</a> <b>XX</b> Daniel Bell (XY7505)	XY Zenith Ltd (XYZEN)	28/02/2021	29/03/2023(E)
<b>XY00000004</b>	Unknown	<a href="#">Copy Assn</a> <b>XX</b> Daniel Bell (XY7505)	XY Zenith Ltd (XYZEN)	07/01/2022	07/05/2022(E)
<b>XYD /13</b>	Unknown	<a href="#">Copy Assn</a> <b>XX</b> Daniel Bell (XY7505)	XY Zenith Ltd (XYZEN)	07/03/2021	21/03/2023(E)
<b>XYD /14</b>	Unknown	<a href="#">Copy Assn</a> <b>XX</b> Daniel Bell (XY7505)	XY Zenith Ltd (XYZEN)	01/02/2021	31/03/2022(E)
<b>XYD /15</b>	Unknown	<a href="#">Copy Assn</a> <b>XX</b> Daniel Bell (XY7505)	XY Zenith Ltd (XYZEN)	28/02/2021	21/03/2023(E)
<b>XYD /22</b>	Unknown	<a href="#">Copy Assn</a> <b>XX</b> Alex Grant (XYDWR/0008)	XY Zenith Ltd (XYZEN)	13/02/2022	01/04/2023(E)
<b>XYD /24</b>	Unknown	<a href="#">Copy Assn</a> <b>XX</b> Daniel Bell (XY7505)	XY Zenith Ltd (XYZEN)	28/02/2021	15/03/2023(E)
<b>XYD /25</b>	Unknown	<a href="#">Copy Assn</a> <b>XX</b> Daniel Bell (XY7505)	XY Zenith Ltd (XYZEN)	28/02/2021	14/03/2023(E)
<b>XYD /3</b>	Unknown	<a href="#">Copy Assn</a> <b>XX</b> Daniel Bell (XY7505)	XY Zenith Ltd (XYZEN)	28/02/2021	29/03/2022(E)



## Manual timesheets - no online access

Create TS are manual timesheets you can create the timesheet for this week by clicking on 'Create TS.'

This will open the timesheet for you to input the hours next to the correct rates.

Once completed click submit.

*\*\* Please note for manual timesheets the signed timesheet needs to be emailed to RFS so they can add this to the invoice for payment. Timesheets need to be sent by 2pm each Tuesday.*

Please enter required information and submit.

<b>Timesheet Number</b>	PIEA23	<b>Timesheet Date *</b>	24/9/2023
<b>Worker Surname</b>	Ash	<b>Assignment Number</b>	PIE /2
<b>Worker Forename</b>	Stephen	<b>Client Name</b>	
<b>Payroll Number *</b>	4	<b>Client Number *</b>	
<b>Employment Type</b>	Umbrella Co.	<b>PO Number</b>	
<b>Agency Name *</b>		<b>Department *</b>	
<b>Consultant</b>		<b>Job Category *</b>	ADMIN
<b>Job Description</b>	ADMIN	<b>Location</b>	
<b>Cost Centre</b>		<b>Hourly Rate %</b>	0.0000
<b>Basic Weeks Per Annum</b>	0.00		
<b>Number Days Worked</b>	0.00		

Rates						
		Frequency	Units	Pay(£)	Bill(£)	
...	BASIC RATE	Hourly		20.00	22.22	<input type="checkbox"/> WTR <input type="checkbox"/> AWR
...	Overtime Rate 1	Hourly		26.67	29.63	<input type="checkbox"/> WTR <input type="checkbox"/> AWR
...	Overtime Rate 2	Hourly		30.00	33.33	<input type="checkbox"/> WTR <input type="checkbox"/> AWR
...						<input type="checkbox"/> WTR <input type="checkbox"/> AWR
...						<input type="checkbox"/> WTR <input type="checkbox"/> AWR

Expenses			
	Units	Pay(£)	Bill(£)
-- Please Select --			
-- Please Select --			
-- Please Select --			

**Submit**



# Adding a payroll company



## Add a payroll company

Go to suppliers on the left hand side and  
Select new supplier.

Complete:

- 1 Payroll group
- 2 Agency name
- 3 Department
- 4 Business name
- 5 Supplier Ref your ACRONYM (this will be provided by RFS once we have on boarded you) plus the first 3 letters of the company name.
- 6 Legal status – ltd company
- 7 Payment option – timesheet as normal
- 8 Trade addresses – need at least 2 lines of address and postcode
- 9 Supplier type is always umbrella for a payroll company.



RECRUITMENT  
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Home · Find Supplier · Add Supplier

1 Payroll Group \*  
2 Agency Name \*  
5 Supplier Ref \*  
6 Legal Status \*  
7 Payment Option \*  
Exclude From WTR

3 Department \*  
4 Business Name \*  
9 Supplier Type \*  
Remittance To \*

8 Trade Address \*

Incorporation Date  
Company Reg \*  
Schedule D Number  
VAT Reg Number

Post Code \*  
Country  
Currency Code  
Notes

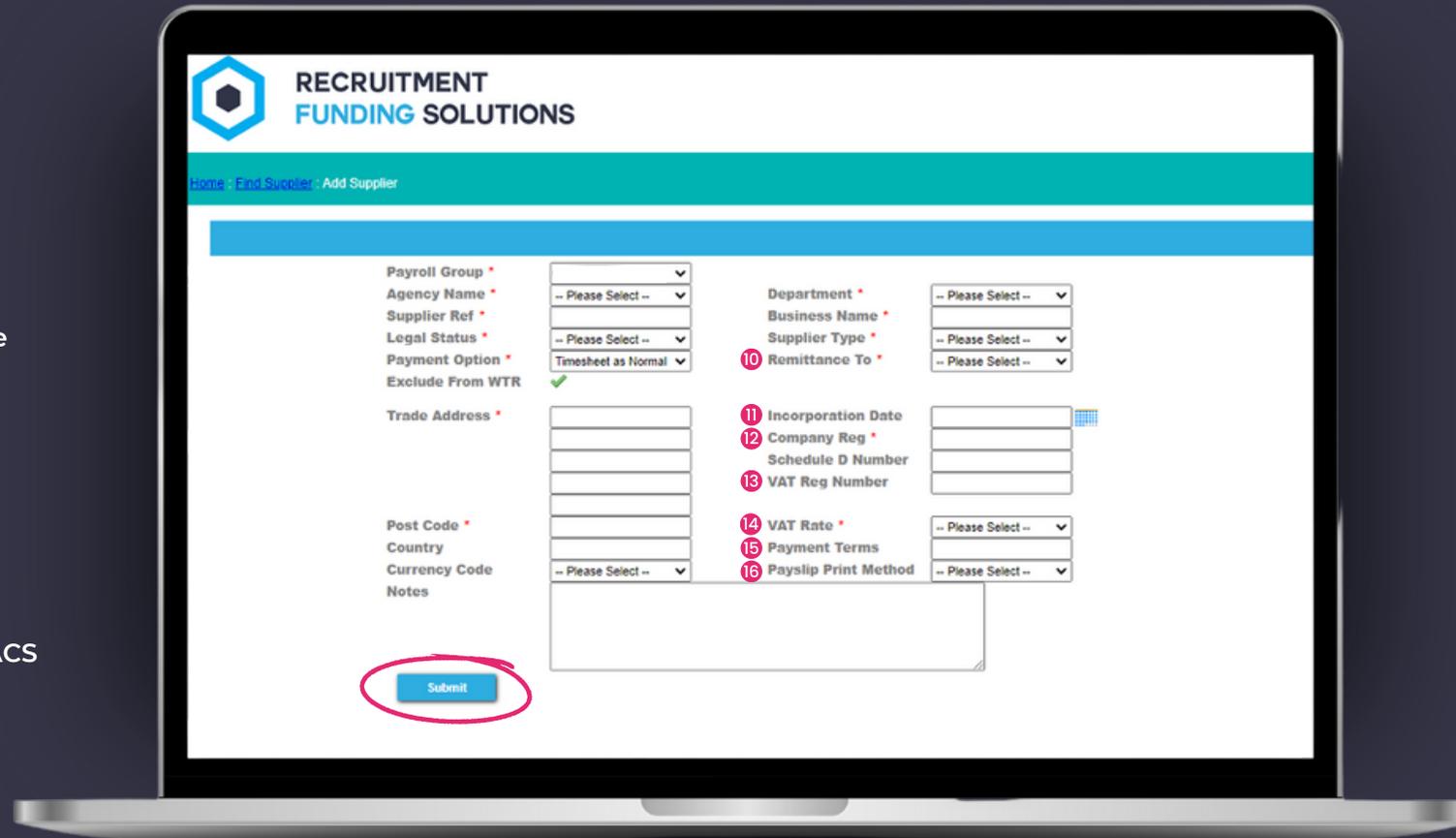
VAT Rate \*  
Payment Terms  
Payslip Print Method

Submit



## Add a payroll company

- 10 Remittance to – trade
- 11 Incorporation date of the payroll company
- 12 Their company Reg number
- 13 Their VAT number
- 14 VAT rate
- 15 Payment terms – always immediate
- 16 Payslip print method – always electronic
- Submit
- Now go to bank details
- 17 Payment method will always be BACS  
Complete Account holder name  
Bank name i.e. NatWest
- 18 Sort code
- 19 Account number
- And submit





# Adding a Limited company



## Add a Ltd company

Go to suppliers on the left and select new supplier

- 1 Payroll group
- 2 Agency name
- 3 Supplier Ref – your Acronym and the first 3 letters of the company name
- 4 Legal status – if your Ltd company is set up under the Construction Industry scheme select CIS
- 5 Payment option – this will depend on the Ltd company if they are happy to be paid directly from the timesheet select timesheet or they can send a purchase invoice – easiest option is timesheet
- 6 Trade address – must be 2 lines minimum and postcode
- 7 Department
- 8 Business name



RECRUITMENT  
FUNDING SOLUTIONS

Home > Find Supplier > Add Supplier

1 Payroll Group \*  
2 Agency Name \*  
3 Supplier Ref \*  
4 Legal Status \*  
5 Payment Option \*  
Exclude From WTR   
6 Trade Address \*  
Post Code \*  
Country  
Currency Code  
Notes

7 Department \*  
8 Business Name \*  
Supplier Type \*  
Remittance To \*  
Incorporation Date  
Company Reg \*  
Schedule D Number  
VAT Reg Number  
VAT Rate \*  
Payment Terms  
Payslip Print Method

Submit



## Add a Ltd company

- 9 Supplier type – umbrella
- 10 Remittance - home or trade
- 11 Their incorporation date
- 12 Their company reg number
- 13 Their VAT number if applicable
- 14 Vat rate – 0 if not Vat reg 20% if Vat reg
- 15 Payment terms – immediate
- 16 Payslip method – electronic

→ Then you need to set up your worker to this supplier by following steps at setting up a worker – select the limited company name in the supplier drop down.

RECRUITMENT  
FUNDING SOLUTIONS

Home · Find Supplier · Add Supplier

Payroll Group \*

Agency Name \*

Supplier Ref \*

Legal Status \*

Payment Option \*

Exclude From WTR

Trade Address \*

Post Code \*

Country

Currency Code

Notes

Department \*

Business Name \*

9 Supplier Type \*

10 Remittance To \*

11 Incorporation Date

12 Company Reg \*

13 VAT Reg Number

14 VAT Rate \*

15 Payment Terms

16 Payslip Print Method

Submit



# Setting up clients (your end buyer)



## Setting up clients (your end buyer)

Go to clients on the left and select new client.

- 1 Agency Name
- 2 Client Name
- 3 Address – 2 lines minimum and a postcode
- 4 Invoice contact name
- 5 Department
- 6 Your ref – Your acronym plus first 3 letter of the client name
- 7 Phone number – landlines only
- 8 Email address of where the invoice is to be sent
- 9 Their company reg number



Home : End Client : Add Client

1 Agency Name \* -- Please Select --

2 Client Name \* [text box]

3 Address \* [text box]  
[text box]

4 Invoicing Contact [text box]

5 Department \* -- Please Select --

6 Your Ref [text box]

7 Phone [text box]

8 Email Address [text box]

9 Company Reg [text box]

Postcode \* [text box]

Country [text box]

Invoice Type \* No Calculation

Invoice Order \* -- Please Select --

Invoice Delivery Method \* -- Please Select --

Master Document \* -- Please Select --

Settlement Terms \* -- Please Select --

Require PO

VAT Rate \* -- Please Select --

Always Subject To PAYE (Where No Assignment Used)

Submit



## Setting up clients (your end buyer)

- 10 Invoice type
  - 11 Invoice order – this will depend on your client and how they want the invoices breaking down, if how they want it breaking down isn't in the list contact RFS and we can add this in for you.
  - 12 Invoice delivery method – always electronic
  - 13 Master doc – always PDF
  - 14 Settlement terms – depending on what you have agreed with the client  
If the client requires a PO please tick the PO box
  - 15 VAT rate if they are VAT registered
  - 16 Don't tick the subject to PAYE box
- Submit

Home : End Client : Add Client

Agency Name \* -- Please Select -- Department \* -- Please Select --

Client Name \*  Your Ref

Address \*  Phone

Fax

Email Address

Company Reg

Postcode \*  10 Invoice Type \* No Calculation

Country  11 Invoice Order \* -- Please Select --

Invoicing Contact  12 Invoice Delivery Method \* -- Please Select --

Credit Checked  13 Master Document \* -- Please Select --

14 Settlement Terms \* -- Please Select --

Require PO

15 VAT Rate \* -- Please Select --

16 Always Subject To PAYE (Where No Assignment Used)

Submit



## Setting up online timesheets

Online timesheets now needs to be turned on with this client if they would like to use the online timesheet portals.

→ Go to online details

1 Tick online Access

2 if you are going to be charging expenses on invoicing to the client tick online expenses and online expenses auth

3 Timesheet Type – this again is dependent upon what the client wants – Time = hours & mins.

Total Unit = total weekly hours

4 Escalation Type – online authorisation

5 Work flow – worker to client

→ Update

Dodd Group (Midlands) Ltd T/A Dodd Group (Cymru)

[Client Details](#)  
[Invoice History](#)  
[Client Timesheet History](#)  
[Credit Note History](#)  
[Previous Workers](#)  
[Online Details](#)  
[Queries](#)  
[Authoriser Groups](#)

**Client Name** Dodd Group (Midlands) Ltd T/A Dodd Group (Cymru)

1 **Online Access**

2 **Online Expenses**

**Online Expenses Auth**

**Expense Receipt Description**

3 **Timesheet Type \*** Time

4 **Escalation Type \*** Online Authorisation

5 **Work Flow \*** Worker to Client

**Update**

[Create new client login](#)

Records 1 To 1 Of 1

Name	User Ref	Parent Auth	Other Auth	Post Code
Donna Male	DODDPIER	Donna Male		TF3 3AZ



## Creating a new user login

- 1 User Ref – this will be whoever will be signing off the timesheet name you can create multiple user log ins for the client
- 2 Forename
- 3 Surname
- 4 Their email address
- 5 Auth parent username – this user

If you have set up more than 1 person who can use the online timesheet you can select another name here – this will send the email to the alternate person if the parent user hasn't signed the timesheet within a certain time.

- 6 Menu template – always Client

→ Create new user

This will now send an email to that person with log in details to access the timesheets portal.

In this portal they can authorise timesheets/reject timesheets/amend hours.

All invoices sent to the client will also show on the portal.

The client can contact credit control direct form their portal also with any issues queries they have on invoices.

The screenshot shows a web form titled "Enter details for New User". On the left, there is a navigation menu with links: Client Details, Invoice History, Client Timesheet History, Credit Note History, Previous Workers, Online Details, Queries, and Authorisor Groups. The main form area contains the following fields:

- 1 User Ref \*
- 2 Forename \*
- 3 Surname \*
- Tele No.
- 4 Email \*
- Address Line 1 \* (Stafford Park 13)
- Address Line 2 (Telford)
- Address Line 3 (Shropshire)
- Address Line 4
- Post Code \* (TF3 3AZ)
- 5 Auth Parent Username (with a dropdown arrow and a "This User" button)
- Auth Alternate Username (with a dropdown arrow and a "This User" button)
- 6 MenuTemplate \* (-- Please Select --)

At the bottom of the form, there is a red button labeled "Create New User" which is circled in red.



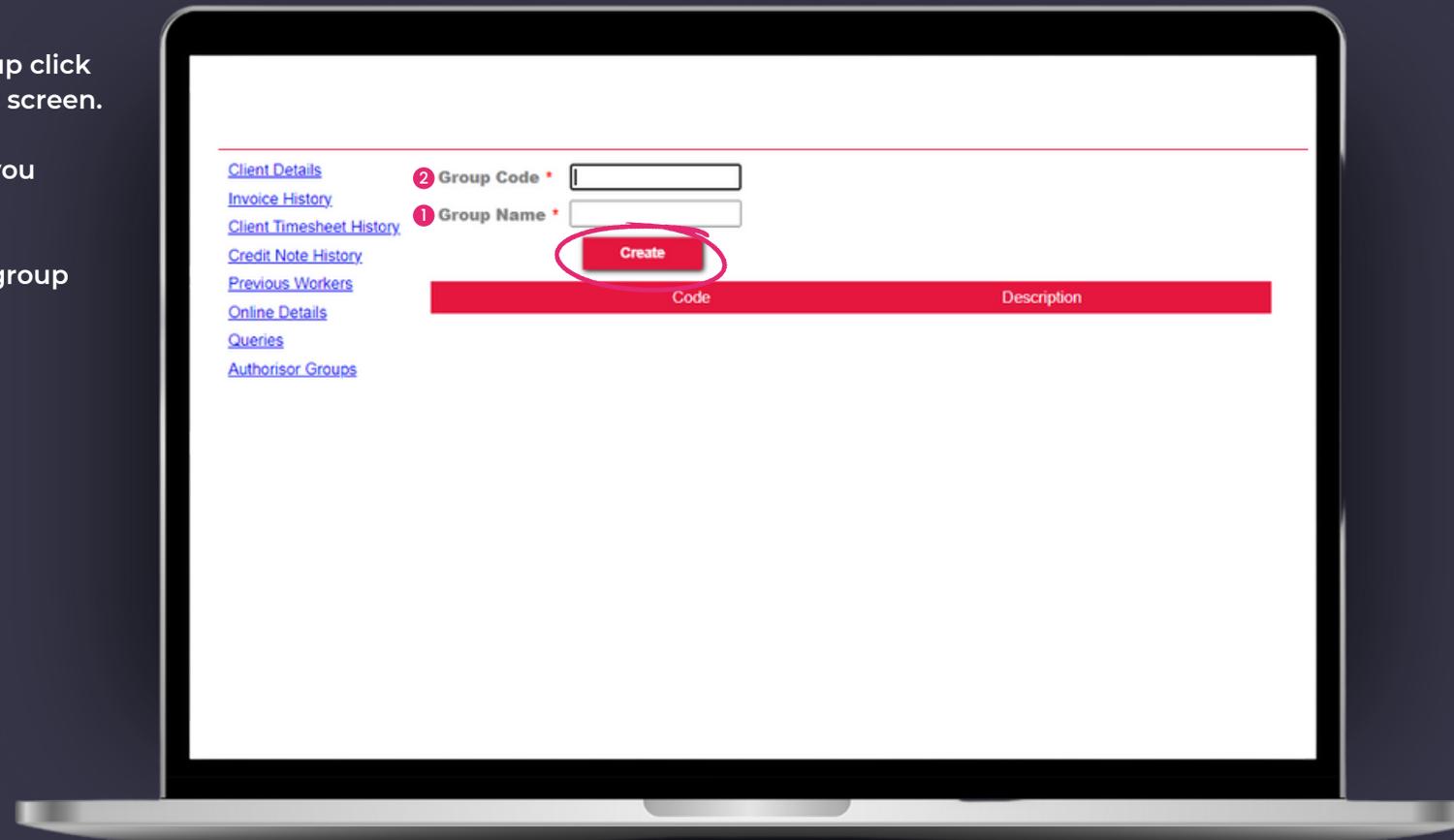
## Setting up authoriser groups

Authoriser groups now need to be set up click on Authoriser groups this will open this screen.

- 1 You can call the group whatever you would like it to be named
- 2 Group code is an acronym of the group name

*Example group code –  
PAY Group name – Payroll*

→ Then click create





## Setting up authoriser groups

Once created you will see the group.

Client Details  
[Invoice History](#)  
[Client Timesheet History](#)  
[Credit Note History](#)  
[Previous Workers](#)  
[Online Details](#)  
[Queries](#)  
[Authoriser Groups](#)

Group Code \*   
 Group Name \*   
 Create

Code	Description
PAY	Payroll

Double click on the checkbox with a pen icon

This will open this box:

Select the Authoriser from the drop down menu, tick all 4 boxes and then click add.

Client Details  
[Invoice History](#)  
[Client Timesheet History](#)  
[Credit Note History](#)  
[Previous Workers](#)  
[Online Details](#)  
[Queries](#)  
[Authoriser Groups](#)

Group Ref: PAY  
 Group Description: Payroll  
 Authoriser \*   
 Enter   
 Amend   
 Approve   
 Authorise   
 Add

No Records Found

Group Member	Enter	Amend	Approve	Authorise
--------------	-------	-------	---------	-----------

Client Details  
[Invoice History](#)  
[Client Timesheet History](#)  
[Credit Note History](#)  
[Previous Workers](#)  
[Online Details](#)  
[Queries](#)  
[Authoriser Groups](#)

Group Ref: PAY  
 Group Description: Payroll  
 Authoriser \*   
 Enter   
 Amend   
 Approve   
 Authorise   
 Add

Group Member	Enter	Amend	Approve
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The online timesheets are now set up, if you have more than one authoriser you can add them in here.



## Adding deductions

For PAYE workers should you receive any letters to deduct any fines or child maintenance.

You can enter these in here – go to add deductions.

The details you need to enter here will be on the letter you receive from the organisation asking you to deduct.

[Home](#) : Add Deduction

Select the type of deduction you require, enter the amount and submit

Deduction created successfully.

**Worker's Surname**



**Worker's Forename**

**Personnel Ref \***



**Deduction Type \***



**Amount To Deduct \***

**Effective Date \***



**Submit**



# Reports and user management



## Reports

In the reports tab there is a list of reports that you can download and export.

## User Management

In the user management tab you can set up consultants in your office to give them access also.



Enter Details For New User

User Name *	<input type="text"/>
Forename *	<input type="text"/>
Surname *	<input type="text"/>
Tele No.	<input type="text"/>
Email *	<input type="text"/>
Address Line 1 *	<input type="text"/>
Address Line 2	<input type="text"/>
Address Line 3	<input type="text"/>
Address Line 4	<input type="text"/>
Post Code *	<input type="text"/>
Start Date *	<input type="text"/>
Employer *	-- Please Select -- <input type="button" value="v"/>
Agency Name	-- Please Select -- <input type="button" value="v"/>
Department *	-- Please Select -- <input type="button" value="v"/>
Office Manager	<input type="checkbox"/>
Security Admin	<input type="checkbox"/>



RECRUITMENT  
FUNDING SOLUTIONS

# Agency Portal User Guide



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