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Notepad

The **Notepad** facility can be used to store information or serve as an automatic Reminder that will appear onscreen on pre-defined periods. It can also be used to print short messages on employees' payslips.   It is available at a company level and at an employee level.

Note: You cannot print a payslip message if the company is using a “Payslip.ini” file. This file defines the layout of non-standard payslips and while it is in use the payslip message will not appear.

Company Notepad

The Company Notepad enables you to create payroll notes for reference purposes. A payroll note can contain one or both of the following elements:

- an **onscreen note** that will open automatically when you set a particular pay period
- a **Payslip note** that will be included in the payslips of this Payroll's employees

Setting up a payroll note

There are a number of ways you can open the Payroll Notepad.

- Click the **Notepad** button in the main toolbar.
- Select **View** Notepad in the navigation pane's Company/Payroll view.
- Select the **Company/Payroll -** Notepad menu option.
- Open the Timesheet Entry window and click the **Notepad** button without selecting an employee.

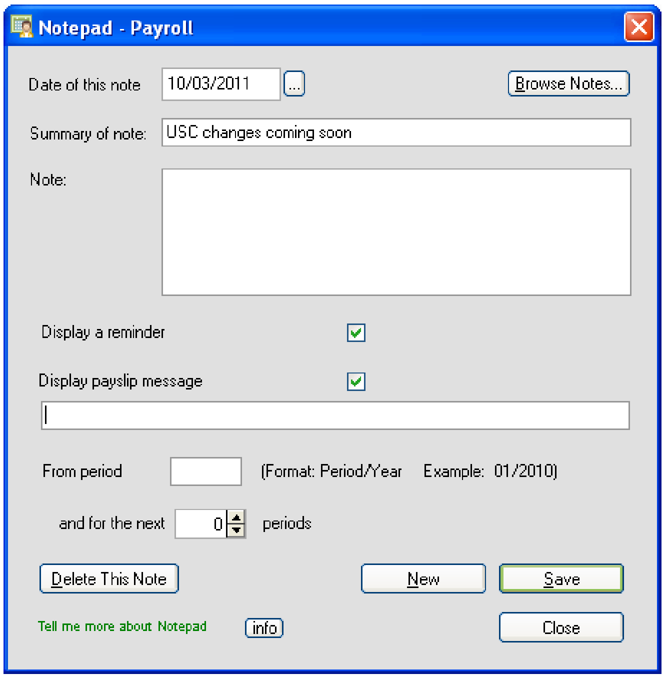
1. When the Notepad screen is open:
2. Click **New** to create a new note, or **Browse Notes** to select an existing note that you wish to edit.

3. Complete the fields as appropriate.

   Select **Info** for definitions on each field.

4. Click **Save**.

Company Notepad Screen:



You have set up a payroll note.

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Employee Notepad

The Employee Notepad enables you to create employee notes for reference purposes. An employee note can contain one or both of the following elements:

- an **onscreen note** that will open automatically when you open the employee's Employee Details record or the employee's Timesheet Entry screen
- a **payslip note** that will be included on the employee's payslip(s) in the relevant pay period(s)

(This payslip note overrides the one set up for all the employees in the payroll.)

Setting up an employee note

To set up a new or existing employee note, follow these steps.

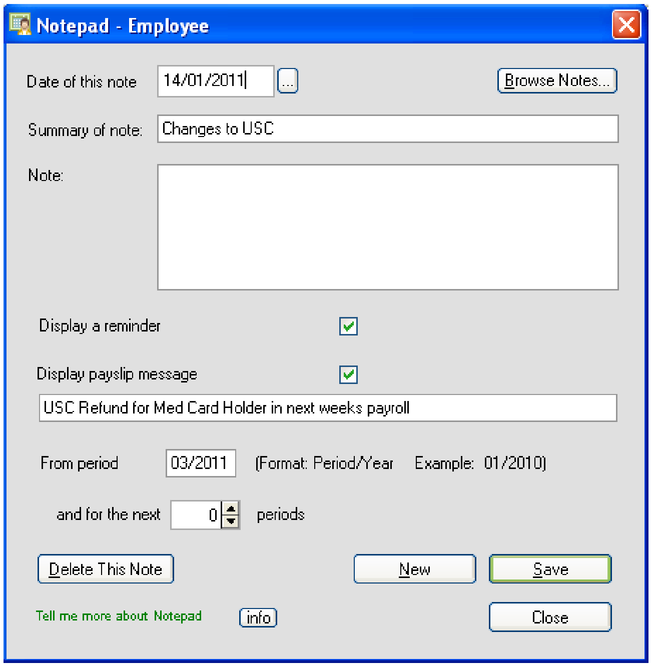
1. There are a number of ways you can open the Employee **Notepad**.

- Open the relevant employee's **Employee Details** record, and click the **Notepad** button.
- Open the **Timesheet Entry** window, select an employee, and click the **Notepad** button.

2. The Notepad -Employee window opens. Click **New** to create a new note, or **Browse Notes** to select an existing note that you wish to edit.
3. Complete the fields as appropriate. The table below explains the function of each item in the window.
4. Click **Save**.

You have set up an employee note.

Standard Notepad Screen:



Definition of Notepad Fields

Date of this Note – The date when the onscreen note was created. The field will default to today's date.

Browse Notes – This allows you to open a list of the employee's notes that have already been set up for this employee. To open one of these notes for further editing, simply click it
To view / edit / delete existing notes click on the **Period** field and press **F2** to display a list of all that were previously saved.

Summary of Note – A title or a brief summary of the contents of the onscreen note.

Note – The main body of the onscreen note.

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Display a Reminder – Selecting this checkbox activates a reminder of the relevant onscreen note that displays whenever you open the employees details record or timesheet entry window in the relevant period(s).

Display Payslip Message – Select this checkbox to activate the field in which you can type a payslip note. The payslip note will be displayed on the employee's payslips in the specified pay periods. This note over-rides any corresponding payroll note.

From Period – Here you specify the pay period in which the note should be activated. Use the following format to specify the pay period, for example, entering 05/2010 specifies that the note should be displayed in period 5 of the 2010 tax year.

And for the next… periods – The number of periods which the note should remain active, i.e. if you enter 05/2010 in the "From Period" field and 3 in this field, the note will remain active in periods 5,6,7 and 8 of the 2010 tax year.

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