

FE MVP Update

| Section | Page | Comments /Changes Needs | Priority |
|----------------------|----------------------|---|------------|
| General (New) | Log-In Page | Minor Changes needed - Detailed in further update | Sprint 1.3 |
| General (New) | Password Reset | Minor Changes | Sprint 1.3 |
| General (New) | Dashboard | Minor Changes | Sprint 1.3 |
| General (New) | Side Bar Menu (main) | Add Payrun. Order should be as below (changes bolded): <ul style="list-style-type: none"> • Home • Company • Set-Up Files <ul style="list-style-type: none"> • Employees • Pay-Run <ul style="list-style-type: none"> • Reports • Settings | MVP Sprint |
| General (New) | Top Bar Logo | Need to try out Payrite Logo and judge. See Appendix | MVP Sprint |
| General (New) | Top Bar Menu | Minor Changes | Sprint 1.3 |
| General (New) | Favicon | Needs to change to Payrite Favicon See Appendix | MVP Sprint |

General Pages

Settings

Company Settings

General Comments:

- The Company Settings section should have a sidebar similar to the Set-up Files

| Section | Page | Comments /Changes Needs | Priority |
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| Company Details | Company Profile (tab) | Minor Changes to page layout (tabs) | 1.1 Sprint |
| Company Details | Company Numbers (tab) | As Above | 1.1 Sprint |
| Payroll Settings | Payroll Types (tabbed) | Changes: Get Rid of the "General" Tab. The "Payroll Policy Tab" should be the landing page for payroll settings. It should summarise the default Payroll Type (e.g. Monthly Salaries) with the same sort of buttons on the page. Ideally, you could also press a "plus" icon next to the existing tab to create a new payroll type | MVP Sprint |
| Payroll Settings | Take-On New Payroll Type | Changes: Review the figma designs. this should not be a pop-up, it needs to be a new tab. | MVP Sprint |
| Payroll Settings | Apply Payroll type to Employees | Changes: Page two of the take-on. This should be it's own page. e.g. "Apply Monthly Salaries". Current Design work looks fine. I will need to adjust further via Figma | 1.1 Sprint |
| Payroll Settings | Review Application of Payroll type | This needs to be its own separate page - to be mocked up on figma | 1.1 Sprint |
| Payroll Settings | Review Applications of Payroll Types | This is working fine. Will have minor | 1.1 Sprint |

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| | | changes to interfacability. Will also need to have the second side menu | |
| Taxes and Returns | General Tax Settings | Changes needed at a later stage | 1.2 Sprint |
| NSSA Settings | General NSSA Settings | Same as Payroll Settings | 1.1 Sprint |
| NSSA Settings | Review Applications of NSSA | Same as Payroll Settings | 1.1 Sprint |
| NEC Settings | General NEC Settings | Same as Payroll Settings | 1.1 Sprint |
| NEC Settings | Apply NEC to Employees | Same as Payroll Settings | 1.1 Sprint |
| NEC Settings | Review Application of NEC | Same as Payroll Settings | 1.1 Sprint |
| NEC Settings | Review Applications of NEC | Same as Payroll Settings | 1.1 Sprint |
| Banks and Branches | Banks List | | 2.2 Sprint |
| Banks and Branches | Edit/Take-On Bank | | 2.2 Sprint |
| Banks and Branches | Branches List | | 2.2 Sprint |
| Banks and Branches | Branch Maintenance page (tabbed) | | 2.2 Sprint |
| Banks and Branches | Take-On Branch | | 2.2 Sprint |
| Company Banks | Review Page (Tabbed) | | 2.2 Sprint |
| Company Banks | Edit/Take-On Company Bank | | 2.2 Sprint |
| Leave Settings | List of Leave Types | | 2.2 Sprint |
| Leave Settings | Review Leave Type | | 2.2 Sprint |
| Leave Settings | Edit/Take-On Leave type | | 2.2 Sprint |
| Leave Settings | Apply Leave Policy to Employees | | 2.2 Sprint |

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| Leave Settings | Review Application of Leave Policy | | 2.2 Sprint |
| Leave Settings | Review Applications of Leave Types | | 2.2 Sprint |

Set-up Files

| Section | Page | Comments /Changes Needs | Priority |
|--------------------------|---------------------------------------|---|------------|
| Allowances | Allowance List | Changes Needed: Review Figma, Needs to be a list of allowances. Generally clients have 40 allowances | MVP Sprint |
| Allowances | Allowance Review | Minor changes | 1.2 Sprint |
| Allowances | Allowance List (Pin) | Needs to be added - Review figma | 1.1 Sprint |
| Allowances | Edit/Take-On Allowance | Minor changes | 1.2 Sprint |
| Allowances | Apply Allowance to Employees | Changes - Review Current Figma Mockup | 1.1 Sprint |
| Allowances | Review Application to Employees | Needs to be added | 1.1 Sprint |
| Allowances | Review All Applications of Allowances | Needs to be added | 1.1 Sprint |
| Deductions | Deduction List | Needs to be added | MVP Sprint |
| Deductions | Deduction Review | | |
| Deductions | Edit/Take-On Deduction | | |
| Deductions | Apply Deduction to Employees | | |
| Deductions | Review Application to Employees | | |
| Deductions | Review Applications of Deductions | | |
| Grades/ Minimum Wages | Grades List (Tabbed) | | |

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|-----------------------------|---|--|--|
| Grades/ Minimum Wages | Apply minimum wages to employees | | |
| Grades/ Minimum Wages | Review Applications of Min Wages | | |
| Unions | General Settings | | |
| Unions | Apply Union to Employees | | |
| Unions | Review Applications of Union | | |
| Pensions | General Settings | | |
| Pensions | Apply Pension to Employees | | |
| Pensions | Review Applications of Pension | | |
| Funeral Insurance | General Settings | | |
| Funeral Insurance | Apply Funeral Insurance to Employees | | |
| Funeral Insurance | Review Applications of Funeral Insurance | | |
| Medical Aid | Medical Aid Providers List | | |
| Medical Aid | Take On new Provider | | |
| Medical Aid | Medical Aid Schemes List | | |
| Medical Aid | Medical Aid Schemes (tabbed) | | |
| Medical Aid | Take-on new scheme | | |
| Medical Aid | Apply medical aid scheme to Employees | | |
| Medical Aid | Review Applications of Medical Aid schemes | | |
| Paypoints | List of Paypoints | | |
| Paypoints | Review/Edit Paypoint | | |
| Paypoints | Add New Paypoint | | |
| Paypoints | Apply Paypoint to employees | | |

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| Paypoints | Review Application | | |
| Cost Centres | List of Paypoints | | |
| Cost Centres | Review/Edit Paypoint | | |
| Cost Centres | Add New Paypoint | | |
| Cost Centres | Apply Paypoint to employees | | |
| Cost Centres | Review Application | | |
| Departments | List of Departments | | |
| Departments | Review/Edit Department | | |
| Departments | Add New Department | | |
| Departments | Apply Department to employees | | |
| Departments | Review Applications of Department | | |
| Locations | List of Locations | | |
| Locations | Review/Edit Location | | |
| Locations | Add New Location | | |
| Locations | Apply Location to employees | | |
| Locations | Review Applications | | |
| Jobs | List of Jobs | | |
| Jobs | Review/Edit Jobs | | |
| Jobs | Add New Jobs | | |
| Jobs | Apply Job to employees | | |
| Jobs | Review Application | | |

Employee Pages

| Section | Pages Required | Comments /Changes Needs | Priority |
|------------------|-----------------------------|-------------------------|------------|
| Employee List | Employee List | Minor Changes | 1.1 Sprint |
| Employee Profile | Employee Dashboard (tabbed) | Review Reqs | MVP Sprint |
| Employee Profile | Monetary Details (tab) | Review Reqs | MVP Sprint |

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|------------------|-----------------------------------|--|------------|
| Employee Profile | Personal Details (tab) | Review Reqs | MVP Sprint |
| Employee Profile | Job Details (tab) | Review Reqs | MVP Sprint |
| Employee Profile | Pay Details (tab) | Review Reqs | MVP Sprint |
| Employee Profile | Banking Details (tab) | Review Reqs | MVP Sprint |
| Employee Profile | Numbers (tab) | Review Reqs | MVP Sprint |
| Employee Profile | Employee Tax Details | Review Reqs | MVP Sprint |
| Employee Profile | Employee Rules | Review Reqs | MVP Sprint |
| Employee Take-on | Take-on Wizard (Simple Version) | These needs to be fleshed out on Figma | MVP Sprint |
| Employee Take-on | Take-on Wizard (Farmers Version) | These needs to be fleshed out on Figma | 1.1 Sprint |
| Employee Take-on | Take-on Wizard (Advanced Version) | These needs to be fleshed out on Figma | 1.1 Sprint |
| Employee Take-On | Excel import Wizard | These needs to be fleshed out on Figma | 1.1 Sprint |

Payrun

Review Reqs:

MVP SPRINT

| Section | Pages Required | Mock-up Template | Requirements |
|------------------|-----------------------|------------------|---|
| Payrun Dashboard | Payrun Dashboard Home | Dashboard | This is a home page for the payrun section. It holds general information related to the payrun that is currently being completed or the last completed payrun - also allows the user to start a new payrun or continue on |

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|-----------------|-------------------------|----------------------------|---|
| Current Pay Run | Summary Page | Dashboard/Payrun Checklist | This is a summary page for the specific pay run - it shows a checklist as well as a summary for what has been changed and a place to continue your pay-run. |
| Current Pay Run | Start of Pay | General Settings | This is a page for the user to enter in dates and rates related to the current pay -run (it signifies the start of a payrun) |
| Current Pay Run | Changes | Reports - Payroll Summary | This is a list in the form of a spreadsheet of all the current employees and a summary of their pay. Allows the user to do bulk changes very quickly and easily |
| Current Pay Run | Changes - Import Wizard | Not created | This is a Wizard that allows the user to take on a CSV file and map the properties to database figures |
| Current Pay Run | Pay Generation | General Settings | This is a page where you can start your generation and shows a loading screen/progress bar |
| Current Pay Run | Pay Run Review | Not created | This is a summary page which a user can "lock-in" their current pay run and review all their reports and summary |
| Current Pay Run | Pay Run Update | Not created | This is a place to "update" your current pay run |

Reports

REPORTS NEED TO BE CREATED MVP SPRINT

System Admin Settings

To Be Reviewed

Appendix

Payrite Logo



Softrite Logo(s)

softtrite



Payrite Favicon



Alternate:

