

Umbrella Control provides key functionality required to efficiently manage payroll for an umbrella company. Umbrella Control can be used by conventional umbrella companies or by financial companies who provide the same facilities as an umbrella company but via multiple limited companies. In addition payroll management for CIS, PAYE, Umbrella, Freelance and Private Limited is included in one system. A number of portals are available and fully integrated, Agency, Contractor, Bureau and Information. Multiple companies can be managed in one system, to enable customers to provide customisable options to their customers.

Umbrella Control was built using KAMMS ITs software framework which provides a secure platform and consistent user interface making it easy to develop and enhance to meet current and future customer needs.

Listed below is brief snapshot of Umbrella Control functionality: -

- **Charging Schemes** - Create multiple definable charging schemes such as standard schemes, promotional schemes and loyalty schemes. The schemes can be fixed or variable based on the invoice value. Each scheme can be configured to apply VAT or not.
- **Expense Schemes** - The system can calculate chargeable fees based on expenses entered.
- **Configurable Expense Types** - Create predefined expense types with default settings to speed up expense capture. Each expense type can be configured to determine whether a receipt is required before it can be processed and passed to payroll.
- **Sector Maintenance** - Provides definable sector descriptions such as engineering, IT, nursing etc. These can then be used for reporting analysis.
- **Department Maintenance** - Departments provide the ability to define who is responsible for each contractor.
- **Company Maintenance** - For businesses that provide Umbrella Company services via multiple limited companies. This functionality allows you to set up as many companies as required.
- **Agency Maintenance** - Create as many agencies as required. Multiple addresses and contacts can be stored against each agency. Default parameters can also be configured to make invoice creation easier.
- **Contractor Maintenance** - Contractor maintenance is provided to capture all the contractor details. You can capture their full name, address, bank details, tax code, date of birth, contact details, charging scheme etc. All captured hours and expenses would be logged against the appropriate contractor for easy retrieval. A Multi-Print option is also available for printing and/or emailing standard documents to contractors, such as contract, expense form, mileage form, introductory letter etc.
- **Easy Find Contractor Tool** - This tool allows the user to easily and quickly find a

contractor when contacted to save time.

- **Hours & Expenses Capture** - This function provides easy entry of contractor hours and expenses. These can be entered per week and using different configurable pay rates. To speed up data entry the system can auto complete entries by just entering the total number of hours worked. All hours entered plus agency expenses can then easily be invoiced.
- **Quick Entry** - Quick Entry is available to manually enter or import timesheets (specific file format required). This allows for bulk timesheet processing. Quick entry can also be imported via the Agency Portal.
- **Agency Invoicing** - Once the hours and expenses have been captured agency invoices can be created either one invoice per entry or multiple entries per invoice, this is totally flexible. The invoice can then either be printed or emailed direct from the system.
- **Payment Reconciliation** - On receipt of agency payments they can be easily reconciled against the invoices to make sure everything is correct before passing to payroll. Various filters are available to make the reconciliation even easier. If any discrepancies are highlighted the system allows you to navigate direct to the appropriate area of the system to correct quickly.
- **Output to Payroll Solutions** - After the payments have been received and reconciled they can be exported to the payroll system. The system shows which amounts are available to be paid and also which expenses can be processed using payment values and the national minimum wage calculation based on hours worked. Any expenses that can not be paid are clearly shown, so that any adjustments required can be made quickly and efficiently. All fees fixed or variable are shown clearly before being exported. All payments, expenses and fees are logged in a history file against the appropriate contractor.
- **Output Recovery** - Utility available to roll-back processing in the event of data entry errors. This can be in bulk or per contractor.
- **Advanced Payments** - Contractor Advanced payments can be requested by agencies, monitored and then reconciled easily.
- **Payslip Management** - Payslip layouts can be customised to suit custom requirements or select from 18 different styles already available. These payslips can be emailed individually or in bulk to the contractors or agencies.
- **Portals** - Management available for configuring user access to Agency and Contractor portals. These portals can be used to enter timesheets, capture expenses, view payslips, update contractor information, view invoices etc.
- **Payment Manager** - This provides the ability to create BACS payment files in various customisable formats.
- **Financial & Pension Export** - Utilities to export data for Financial and Pension systems.
- **Document Manager** - Document Manager can store documents against contractors, companies and agencies to allow them to be located quickly. These can either be connected via a hyperlink or a complete copy can be stored in the system.
- **Task Manager** - Task Manager provides functionality to log tasks against one or more users. A task record can also be linked to internal records such as contractor, agency etc., to enable them to be found easily and quickly. Timed reminders can be setup to prompt users. The system can notify users via popup messages or email.
- **SMS Manager** - SMS Manager provides automated text of contractors. e.g. texting most recent net pay after payroll processing.
- **Referral Manager** - The Referral Manager provides functionality to capture, monitor and prompt for payment.

- **Compliance Manager** - Compliance Manager provides AWR style functionality.
- **Secure Logon** - A secure user manager is provided to create new users.
- **Functionality Access Control** - Access to all key functions can be configured via user groups. A user group can have one or more users linked to it. This allows users that perform the same function to have the same access rights.
- **Customisable Reporting Engine** - All reports can be customised via an in-built search engine. Also customer-specific templates can be created to redefine report layouts.
- **Knowledge Base Tool** - Knowledge base is a tool that provides functionality for storing general information that is useful to the business and needs to be readily available to all users.
- **Business Manuals Tool** - Business Manuals is a tool for linking business procedures and processes to the system, making them centrally available and easily accessible. Ideal for businesses that have to adhere to standards, such as BSI.
- **Context Sensitive Help** - Help is available via the "F1" key when a window is open.

For more details or a demo please contact Daniel Clark at Ryba Macaulay Ltd via [Umbrella Software](#) website.