



Set-up user guide

Table of contents

Opening a pensionsync account for the first time.....	2
How to open an Account	2
Understanding your Account	4
Viewing your account	4
Account Details	5
Payroll Administrator Template.....	7
Provider Preferences	8
Data Management (& how to make a back-up)	9
Understanding the Main Menu functions	10
Account	10
Dashboard.....	12
New Scheme	13
Need help?	14

1 The fastest way to ask for support from the pensionsync team is via online chat, which you can access from within pensionsync. Please refer to the last section in this document on how to use our Chat tool

pensionsync

Opening a pensionsync account for the first time

This section will help you set up a pensionsync account, and manage the data within your account.

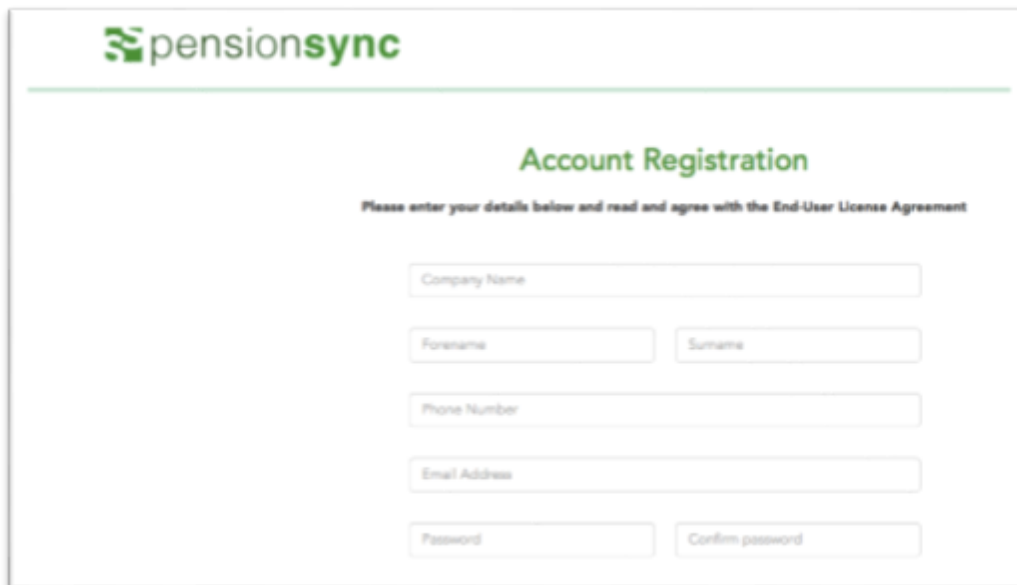
You can only open pensionsync from within your payroll software. It is not possible to open pensionsync from our website (www.pensionsync.com).

If you are not sure how to launch pensionsync then please ask your payroll software technical support team.

You will see when you set up your account, that some hints will appear to explain a little about the functions within pensionsync.

How to open an Account

The first step is registration. We require every user of pensionsync to register before they do anything else.



The screenshot shows the 'Account Registration' page of the pensionsync interface. At the top left is the pensionsync logo. The title 'Account Registration' is centered in green. Below the title is a instruction: 'Please enter your details below and read and agree with the End-User License Agreement'. The form contains several input fields: 'Company Name', 'Forename', 'Surname', 'Phone Number', 'Email Address', 'Password', and 'Confirm password'.

Passwords must contain at least 8 characters, have at least 1 upper case letter and 1 lowercase letter. There is a tool tip to explain this.



Our End User Licence Agreement can be read by scrolling down prior to setting up your account, and you can also use the green button to download these to save and read later. You must however agree to these by checking the box prior to proceeding.

SYSTEMSYNC SOLUTIONS LTD

pensionsync USER SERVICE TERMS

(January 2017 edition)

Thank you for selecting pensionsync offered by systemsync solutions ltd (referred to as "systemsync", "we," "our," or "us"). Please review these terms ("Terms") thoroughly. Your agreement to these Terms constitutes a legal agreement with systemsync solutions ltd, and authorises you to become a User of pensionsync.

By accepting electronically (for example clicking "I Agree", or accessing or using pensionsync), you agree to these Terms. If you do not agree to these Terms, then you may not use pensionsync.

DICTIONARY OF TERMS

[Download End-User License Agreement](#)

Please tick the box below to confirm that you agree with the pensionsync End-User License Agreement

I agree to be bound by pensionsync's End-User License Agreement

[Register Account](#)

Once you have checked the Terms & Conditions box you can proceed with registration.

Congratulations! Your account with pensionsync is now set up.

Understanding your Account

This section will explain how you to set up and manage all the areas of your account. Your account details in pensionsync are only accessible by the account manager.

Viewing your account

Once you have registered for your account you will be taken to your account “Overview” page.

It will show the registered company name, your account number with pensionsync.

Test Payroll Ltd | DM6264346 | Premium support

Overview Account Details Usage Payroll Administrator Template Provider Preferences Data Management

Account Type: Premium support

Account Creation Date: 31/01/2017

Support Pack Expiry Date: 30/07/2017

There are 2 types of account with pensionsync, Basic Support and Premium Support.

Basic support is free, and typically queries are managed within 3 working days.

Our Free training package includes webinars, training videos and user guides.

Premium support is at a cost of £20 per month, and typically, queries are managed within 1 working day. Premium Training will give you access to all our free materials and additional training can be purchased which will include bespoke training sessions by one of our consultants, at a one-off cost of £200. These can be delivered at any time, there is no expiry limit.

	Basic	Premium
Support		
Service-level Agreement	3 working days	1 working day
Price	Free	£20 / month
Training		
Free & open webinars	✓	✓
Training videos	✓	✓
Downloadable user guides	✓	✓
Training requirements consultation call		✓
Individual training plan		✓
Training session(s) as agreed		✓
Price	Free	£200 / training plan
Buy Training		

Account Details

We require that the Account details section is completed by the Account holder. pensionsync needs information on your company, and the contact details of the principle account holder.

Test Payroll Ltd | DM6264346 | Premium support

Overview Account Details Usage Payroll Administrator Template Provider Preferences Data Management

Company Details edit

Test Payroll Ltd

TestPayroll

Contact Details

Main Contact

Nicki Dady

nicki@test.com

Edit

If you click on “Edit” next to company details, you can add your full company details here. If you have your “Registered Company Number” from Companies House, you can add this in the first field, click on “Get Info” and it will bring up your registered details automatically.

Personalising your Account

Please upload your company logo and set a SenderId

We recommend that before you use pensionsync to apply for a new pension scheme (for example with Legal & General) that you:

- 1. Upload your company logo to pensionsync.**
Your company logo will be used when we present a summary of the new pension scheme application to your Employer Client. This helps reassure your Employer Client that the scheme application process is being managed by a trusted supplier (e.g. your company) which is already known to them.
- 2. Set your “SenderId”.**
The “SenderId” is used by pensionsync when we send Text messages to your Employer Client’s mobile phone. We send messages to your Employer Client’s phone during the pension scheme application process to help securely identify the Employer (using a process known as Two Factor Authentication).

How to upload your company logo & set your SenderId

5 The fastest way to ask for support from the pensionsync team is via online chat, which you can access from within pensionsync. Please refer to the last section in this document on how to use our Chat tool

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Firstly, collect your company logo and decide on your SenderId

- Your company logo should be either a JPG or a PNG. We don't restrict the size of the image, but we recommend it should be no wider than 400 pixels and not larger than 1MB.
- Your SenderId must be Alphanumeric (A-Z, a-z, 0-9) and with minimum of 3 and Maximum of 11 characters.

Then go to your "Account details" page which can be found in under your "Account" main menu item. Click on the "edit" button next to "Company details".

This will take you to the following screen, where you can upload your company logo and set your SenderId.

Company Details

Registered Company Number	<input type="text"/>	Get Info	Registered Company Address	Address line 1	<input type="text" value="York Road"/>
Company Name	<input type="text" value="Payroll Test Ltd"/>		Address line 2	<input type="text"/>	
Company Logo	Upload File		Town / City	<input type="text" value="Swindon"/>	
Support Email Address	<input type="text" value="nicki@payrolltest.com"/>		County	<input type="text" value="Wiltshire"/>	
Support Phone Number	<input type="text" value="01793937788"/>		Post Code	<input type="text" value="SN2 5JH"/>	
Company Sender ID 	<input type="text" value="PayrollTest"/>		Country	<input type="text"/>	
Company website	<input type="text"/>				

[Save](#)
[Cancel](#)

When you save this information, it will now appear in your "Account Details" and can be edited at any time.

Usage

Usage covers billing periods and invoice history for previous chargeable clients. Current usage shows a breakdown of the Employer submissions and Employee submissions that have been sent in this period, so you can keep a tally on what you are using.

Any premium purchases for support and training will be shown and stored here.

Usage History						
Billing Period	Invoice Date	Due Date	Invoice	Total Charge	Status	Usage Report

Payroll Administrator Template

If you will be using pensionsync to apply for new schemes on behalf of your clients, then we recommend you complete the “payroll administrator template”. pensionsync can use the information in this template (meaning you don’t have to re-key it into every new pension scheme application). This will save you time.

If you have a Limited Company, you can use your registered company number from Companies House in this section and it populates the details for you when you use the green “Get Company Info” button.

Test Payroll Ltd | DM6264346 | Premium support

Overview Account Details Usage Payroll Administrator Template Provider Preferences Data Management

If you will be setting up new schemes on behalf of your clients, then completing this template will save you time.

Please select your template

- ✓ Test Payroll Ltd - Nicki Dady
- Test Payroll Ltd - Jane Doe

Administrator's Contact Information

* Title: Mrs

* Forename: Nicki

* Surname: Dady

* Gender: Female

Date of Birth:

* Email Address: nicki@test.com

* Phone Number: 07960012345

Registered Company Information [Get Company Info](#)

Registered Company Number:

* Company Name: Test Payroll Ltd

* Address line 1: Test Lane

Address line 2: High Street

* Town / City: London

County:

* Post Code: SW15 6JH

[Need help](#)

If you have a different office address to the registered company, you can add this by checking the box and completing the address details.

My office Address is different to my company's Registered Address

Office Address

* Address line 1:

Address line 2:

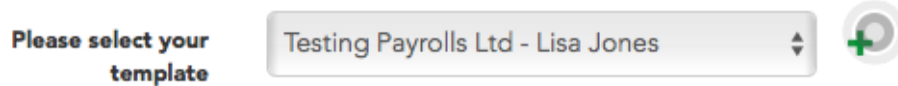
* Town / City:

County:

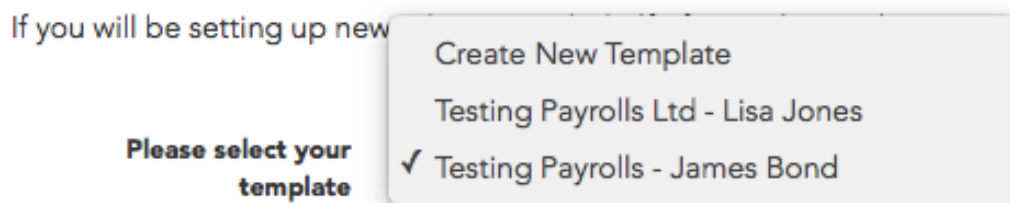
* Post Code:

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You can add multiple administrator templates, so if you have more than one, once you have set up your first template and saved it, a green “plus” button will appear next to your template;



Clicking on this brings up a new template, complete this and you will then have a drop down box with a choice of templates to use as well as an option to create a new template;



Provider Preferences

Some Pension Providers have specific fields that require certain preferences completing in order for data to be submitted and to match the criteria within their system.

NEST provider preferences allow you to define whether or not NEST can automatically collect payments once you have successfully made a contribution submission. The default value is “APPROVE” meaning that NEST will automatically collect the payment from the Employer. If NEST does not automatically collect the payment from the employer, then you or the employer will need to manually approve payments via the NEST portal.

Please note; once you have set your preferences to APPROVE payments here, it will apply to ALL of your NEST schemes.

We provide more information on how to configure your NEST provider preferences in the document titled “Guide to Working With NEST”.

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Automatic Contributions Payment Approval

By default the position for all NEST clients will be that the system will automatically issue the payment approval instruction for the applicable contribution schedules 4 working days before the payment due date on a monthly basis, except for the first payment for any payment source which will be issued 7 working days before the payment due date. Should a contribution schedule be received after this date, the schedule shall be approved for payment straight after NEST has confirmed the successful processing of the contribution data.

If you do not have an explicit agreement or understanding with your clients to authorise the contribution payments then you should default the Automatic Contribution Payment Approval value to "Reject".

At any time you will still have the opportunity to set the Automatic Contribution Payment Approval to a value different from the default value, for each employer on an individual basis, scheme by scheme.

Regardless of what the Automatic Contribution Payment Approval default value is the employer or its representative remain responsible to ensure that contribution payments are processed every month in a timely manner.

Automate Contribution Payment? Your details have been saved

Specific Scheme Payment Approval Override

The Automate Payment Contribution setting above will globally set your NEST payment approval preferences. However you can override this on a scheme-by-scheme basis by finding or retrieving a specific NEST scheme and setting the payment approval in the Payment Details tab by clicking here.

[Go to a specific NEST scheme](#)

Legal & General provider preferences are to set where the communications from Legal & General are sent. These can be sent to the employer or the administrator.

By confirming that by setting the Send Communications to "Administrator", you are declaring that you have an explicit agreement or understanding with your clients to handle all communications with Legal & General.

If you do not have an explicit agreement or understanding with your clients to handle all the communications with Legal & General leave the Send Communications to with the default value of "Employer".

Some Pension Providers have specific fields that require certain preferences completing in order for data to be submitted and to match the criteria within their system. Please tailor the Pension Provider settings accordingly to your preference.

Pension Provider

Communications

I confirm that by setting the Send Communications to "Administrator", I have an explicit agreement or understanding with my clients to handle all communications with Legal & General.

If you do not have an explicit agreement or understanding with your clients to handle all the communications with Legal & General leave the Send Communications to with the default value of "Employer".

Send Communications to

Data Management (& how to make a back-up)

In pensionsync, you are responsible for backing up and maintaining your own data, and we recommend this is done on a regular basis.

Using the 'Backup Your Data' functionality allows you to download all the scheme data

associated with your pensionsync account

[Overview](#) [Account Details](#) [Payroll Administrator Template](#) [Provider Preferences](#) [Data Management](#)

Scheme data backup

Last Backup Date: Never

Please be aware that you are responsible for backing up and maintaining your data.

Using the 'Backup Your Data' functionality allows you to download all the scheme data associated with your pensionsync account.

By clicking 'Backup Your Data', and downloading your data in the XML format, you understand it is not encrypted, meaning that it can be opened by anyone in receipt of the file. Please take appropriate measures to protect this data and prevent unauthorised access to it. In most cases, it is easiest to download it directly to your computer but you should also consider the subscription of a cloud storage, or other alternative storage space, where you are the only user to have access to it.

[Backup Your Data](#)

Please be aware that by clicking 'Backup Your Data', you are then able to download your data in an XML format and it is not encrypted, meaning that it can be opened by anyone in receipt of the file. Please ensure appropriate measures to protect this data and prevent unauthorised access to it.

Once you have backed up the date will show in the "Last Backup Date" field.

Understanding the Main Menu functions

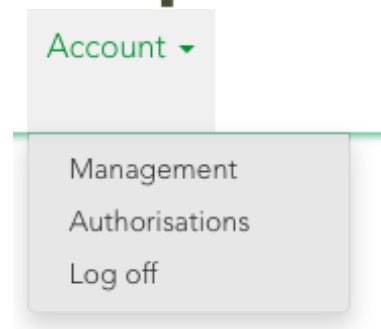
This section helps you understand what the main menu functions at the top right of your screen are used for.

The pensionsync main menu has 4 buttons:

[Dashboard](#) [New scheme](#) [Alerts](#) 1 [Account](#) ▼

Account

Once you have completed registration and account set up, you can manage your account by going to the main functions menu at the top right of the page, and clicking on Account. You have 3 options here; [Management](#); [Authorisations](#) and [Log off](#).



By choosing “Management” this takes you to an overview of the account. You can amend details here at any time. Only the “Account holder” (the person who initially registered with pensionsync) can see the account management section.

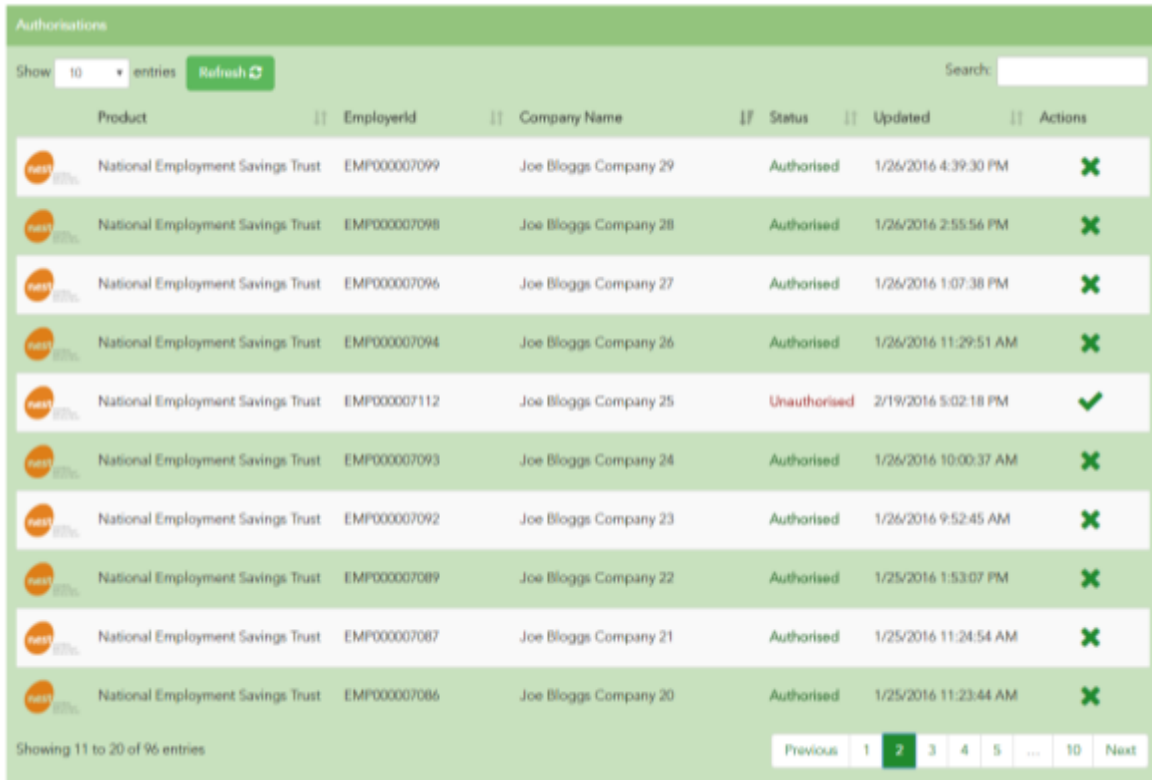
“Authorisations” gives you an overview of the schemes that require you to enter your Username and Password before pensionsync can upload data to the providers on your behalf.

If you see a pension scheme which has the word “Unauthorised” in red next to it, then you will have to take action. Please click the “green tick” next to the scheme.

When you click the “green tick” you may be prompted to enter your provider Username and Password for that provider. Your provider Username and Password is issued to you by the pension provider. pensionsync uses your provider Username and Password to upload data on your behalf to the specific pension scheme.

If pensionsync does require your provider Username and Password, then we will open a new tab in your browser & ask you to enter them.

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Product	EmployerId	Company Name	Status	Updated	Actions
National Employment Savings Trust	EMP000007099	Joe Bloggs Company 29	Authorised	1/26/2016 4:39:30 PM	✘
National Employment Savings Trust	EMP000007098	Joe Bloggs Company 28	Authorised	1/26/2016 2:55:56 PM	✘
National Employment Savings Trust	EMP000007096	Joe Bloggs Company 27	Authorised	1/26/2016 1:07:38 PM	✘
National Employment Savings Trust	EMP000007094	Joe Bloggs Company 26	Authorised	1/26/2016 11:29:51 AM	✘
National Employment Savings Trust	EMP000007112	Joe Bloggs Company 25	Unauthorised	2/19/2016 5:02:18 PM	✔
National Employment Savings Trust	EMP000007093	Joe Bloggs Company 24	Authorised	1/26/2016 10:00:37 AM	✘
National Employment Savings Trust	EMP000007092	Joe Bloggs Company 23	Authorised	1/26/2016 9:52:45 AM	✘
National Employment Savings Trust	EMP000007089	Joe Bloggs Company 22	Authorised	1/25/2016 1:53:07 PM	✘
National Employment Savings Trust	EMP000007087	Joe Bloggs Company 21	Authorised	1/25/2016 11:24:54 AM	✘
National Employment Savings Trust	EMP000007086	Joe Bloggs Company 20	Authorised	1/25/2016 11:23:44 AM	✘

Showing 11 to 20 of 96 entries

Previous 1 2 3 4 5 ... 10 Next

Dashboard

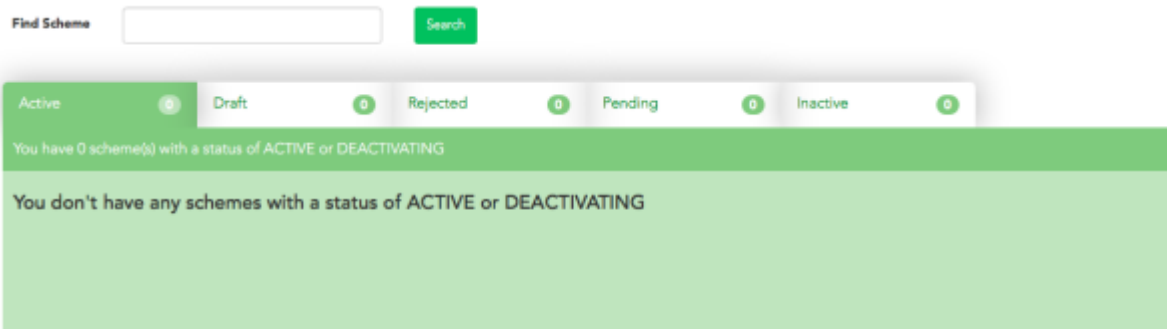
The Dashboard is where you will see all of your pension schemes that are held within pensionsync.

The Active schemes, or live schemes, appear here. The other options are Draft, Rejected, Pending and Inactive schemes:

- Active = the scheme is set-up, approved by the pension provider and by the Employer, active, and you can submit contributions to the scheme (via pensionsync).
- Draft = the application for a new scheme is partially completed & saved as a “draft”.
- Pending = the application for a new scheme is with a 3rd party (such as the pension provider) and pensionsync is waiting to hear back from that 3rd party.
- Rejected = the application for a new scheme has been rejected by the 3rd party.
- Inactive = the pension scheme has been deactivated by the pension provider.

Search

You can use the Dashboard to search for an existing pension scheme using the search field. We search based on Company Name, Scheme Status, Pension Provider and Company Id. Search is case insensitive and allows partial matches for all the referred fields.



New Scheme

Choosing this from your menu will take you into the workflow for applying for a new pension scheme. This section is covered in more details under our individual guides for working with pension providers.

Which provider has your Client instructed you to create an account with?

I acknowledge that: (a) This selection of pension providers does not represent every pension provider in the market, nor does it represent a filtered list of pension providers who may be suitable for my client's needs. (b) I am acting on behalf of my Client who has instructed me in writing to open an account with the pension provider I am about to select. (c) I agree with the [Privacy Policy](#).



We recommend that prior to selecting a workplace pension provider, Employers are directed to [The Pensions Regulator website](#), an independent financial adviser or an online pension provider selection tool.

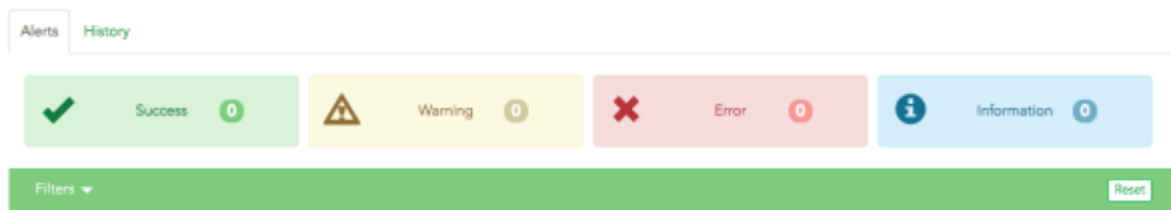
Please note you can start drafting multiple schemes with your free user account, but you cannot activate them. Please remember to delete any draft schemes prior to upgrading your account if they are not “real schemes”.

pensionsync

Alerts

Alerts is a tool that monitors the status of various activities relating to your pension schemes (such as new applications for schemes & data submissions).

You will receive messages from pension providers here once you have set up and retrieved schemes, and you can pick up error messages, authorise and submit schemes. This area is covered in more detail in our setting up schemes sections.



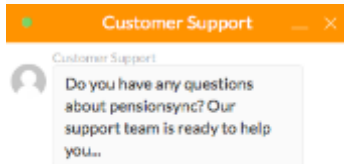
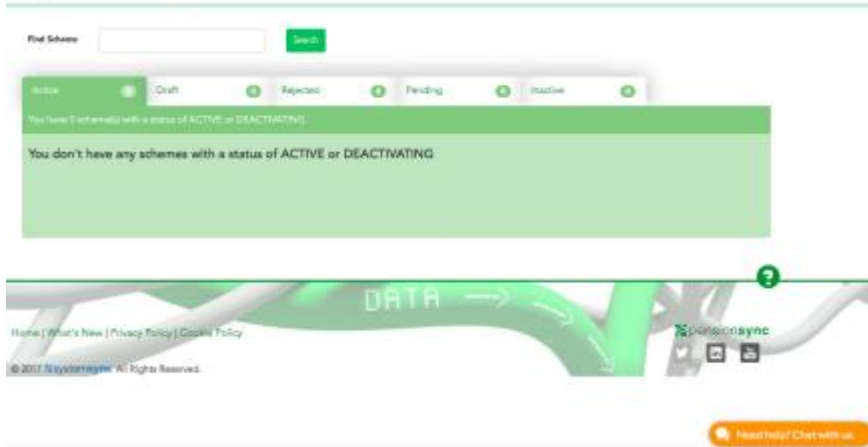
Need help?

This final section explains how to use our chat support tool within pensionsync. Using Chat is the fastest, and best way, to get support from pensionsync.

Our customer support chat tool can be launched at any time from within the scheme management tool.

Once you have opened the registration page, you have the option to chat to us via the web if you require any assistance while setting up and during the process. Our chat box is always at the bottom right of the page.





Simply type your message to start talking to us. One of our support team will come back to you with assistance, we are always happy to help.