



A Quick Guide to Running a Trial Payroll

Step	Action	Menu Path
1	<p>Install Software</p> <p>Install SagePay software.</p>	Refer to install guide
2	<p>Setup Trial Data</p> <p>Visit www.sagepay.com.au and download the trial database.</p> <p> Refer to the FAQ Downloading Trial Data for instructions on downloading the Trial Data for SagePay</p> <p> Refer to the FAQ How do I Backup and Restore a Database for instructions on restoring the Trial Data into SagePay Company1 database.</p> <p>NOTE: This process will overwrite any data you already have in the Company1 database. If you have used SagePay since installation, we recommend you backup your existing data.</p>	www.sagepay.com.au
3	<p>Log into SagePay</p> <p>1 Enter the Agent login and Password.</p> <p style="padding-left: 40px;">Agent = Admin Password = Admin</p> <p>2 Select Company1</p> <p>3 Click OK to open SagePay.</p>	
4	<p>Generate pays</p> <p>1 Go to the Transaction > Enter Pays menu and select Generate Auto Pay Transactions.</p> <p>2 On the Generate Auto Pay Transaction window, select Monthly from the Pay Frequency dropdown list</p> <p>3 Click OK to generate the auto pays.</p> <p>This will generate pays for 5 people.</p>	Transactions > Enter Pays > Generate Auto Pay Transactions

5	<p>Print a Transaction Report</p> <ol style="list-style-type: none"> 1 Go to the Reports > Transactions menu and select Transaction Report. 2 Do not change the settings on the Report tab. Accept the default information. 3 Select Preview to view to screen or Print to send it to your printer. 	<p>Reports > Transactions > Transaction Report</p>
6	<p>Print a Payroll Report</p> <ol style="list-style-type: none"> 1 Go to the Reports > Transactions menu and select Payroll Report. 2 Do not change the settings on the Report tab. Accept the default information. 3 Select Preview to view to screen or Print to send it to your printer. 	<p>Reports > Transactions > Payroll Report</p>
7	<p>Perform EFT Export</p> <ol style="list-style-type: none"> 1 Go to the Transaction > Create EFT File menu and select EFT Export. 2 Select ABC company from the dropdown list on the EFT Institution field. 3 Select EFT File at the bottom of the EFT Export window. <p>This will generate the EFT file and display the EFT report on screen.</p>	<p>Transactions > Create EFT File > EFT Export</p>
8	<p>Print Pay Advices</p> <ol style="list-style-type: none"> 1 Go to the Reports > Transactions menu and select Pay Advices. 2 Select Preview and the Pay Advice will be displayed. <p>NOTE: The Pay Advices have been developed to print on preprinted pay advices forms only. These are available for your software supplier.</p>	<p>Reports > Transactions > Pay Advices</p>
9	<p>Print reports</p> <p>Congratulations! You have just completed a payroll. You can now print any of the End of Pays reports such as</p> <ul style="list-style-type: none"> • Additions and Deductions Report • Costing Summary Report • Leave Summary and Liability • SGL Report - if required. 	<p>Reports > End of Pay</p>