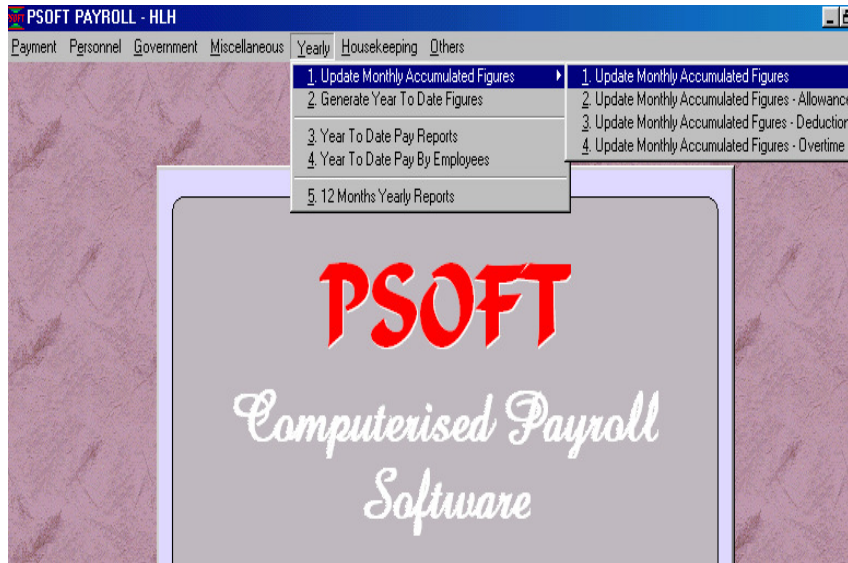# Chapter 5. Yearly

This **Yearly** option as shown in the screen below allows us to view and update the monthly Basic Pay, Overtime, Allowances, Deductions Gross Pay, Taxable Allowances and Taxable Overtime. It also generates Year To Date Pay figures and the various yearly reports.

Update Monthly Accumulated Figures - Basic/Gross Pay

The first option in the **Yearly** section allows us to update monthly pay data of the employee. (This option is also used for those company which starts using Psoft Payroll software half way in the financial year. Example: The company start Psoft Payroll in March, that means it calculate employee pay using Psoft in March. For the months January and February, the staff payroll were calculated manually, therefore these two months are not in the Psoft Year To Date accumulated figures. To add them in, we will come here to enter each employee's pay using its manually calculated pay slip data. Once this is done, the employees' year to date payroll data will be

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complete and up to date. And the IR8A figure will then be correct.

Once we click on this first option, the following table will appear for up to view and update employees' past month's pay data:

Update Accumulated Figures

Employee: DF0001   Name: FOO CHEAN TAY
Line No.

| Update 1 | Update 2 | Update 3 | Update 4 |

Month	Basic	Overtime	Allowances	Dir. Fee	Gross	Tax OT	Tax All
Jan	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Feb	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Mar	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Apr	0.00	0.00	0.00	0.00	0.00	0.00	0.00
May	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Jun	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Jul	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Aug	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sep	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Oct	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Nov	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Dec	0.00	0.00	0.00	0.00	0.00	0.00	0.00
...	0.00	0.00	0.00	0.00	0.00	0.00	0.00
..Jan	4200.00	0.00	0.00	0.00	4200.00	0.00	0.00
Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00

| Top | Prev | Next | Bottom | Search | Save | Exit |

From the screen we can view and update the monthly Basic Pay, Overtime, Allowances, Deductions, Gross Pay, Taxable Allowances and Taxable Overtime.

Notice that this screen belongs to the Tab - Update1. We can see that there are tabs labeled as Update2, Update3 and Update4.

After we have view and update the Update1 table, we continue to check the Update2 Table by clicking on its tab, another table will appear as below for us to view and update:

Update Accumulated Figures

Employee DF0001   Name FOO CHEAN TAY
Line No.

| Update 1 | Update 2 | Update 3 | Update 4 |

Month	Bonus	Commission	Other	CPF(Yee)		CPF(YER)	
Jan	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Feb	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Mar	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Apr	0.00	0.00	0.00	0.00	0.00	0.00	0.00
May	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Jun	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Jul	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Aug	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sep	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Oct	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Nov	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Dec	0.00	0.00	0.00	0.00	0.00	0.00	0.00
...	0.00	0.00	0.00	0.00	0.00	0.00	0.00
..Jan	0.00	0.00	0.00	840.00	0.00	546.00	0.00
Total	0.00	0.00	0.00	840.00	0.00	546.00	0.00

| Top | Prev | Next | Bottom | Search | Save | Exit |

In this table we can view and update employee's past months' Bonus, commission, CPF by employee and employer.

Similarly for Update3 table where we can view and update emplyees's Advance Pay, Net Pay, Public Holiday, and all the leave records.
For Update4 Table, we can view and update emplyees's records
of No Pay leave and Leave of Absence.

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After we have view and update all the above tables, we must click the Save button to confirm the change. Then we can proceed to next or previous employee by clicking the **Next** or **Previous** button accordingly.

Update Monthly Accumulated Figures - Allowance

This option in the **Yearly** section allows us to update monthly pay Allowance data of the employee in the similar principle as above. The table selected are as shown:

Month	Aw 1	Aw 2	Aw 3	Aw 4	Aw 5	Aw 6	Aw 7	Aw 8
Jan	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Feb	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Mar	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Apr	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
May	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Jun	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Jul	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Aug	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sep	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Oct	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Nov	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Dec	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
...	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
..Jan	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Similarly from the screen we can view and update the monthly Allowance data breakdown details.

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Update Monthly Accumulated Figures - Deduction

This option in the **Yearly** section allows us to update monthly pay Deduction data of the employee in the similar principle as above. The table selected are as shown:

Month	Ded 1	Ded 2	Ded 3	Ded 4	Ded 5	Ded 6	Ded 7	Ded 8
Jan	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Feb	0.00	0.00	0.00	.	0.00	0.00	0.00	0.00
Mar	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Apr	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
May	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Jun	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Jul	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Aug	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sep	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Oct	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Nov	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Dec	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
...	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
..Jan	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Similarly from the screen we can view and update the monthly Deduction data breakdown details.

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Update Monthly Accumulated Figures - Overtime

This option in the **Yearly** section allows us to update monthly pay
Overtime data of the employee in the similar principle as above.
The table selected are as shown:

Update Accumulated Figures - Deduction

Employee	DF0001	Name	F00 CHEAN TAY
Line No.			

Overtime

Month	OT 1	OT 2	OT 3	OT 4	OT 5	OT 6
Jan	0.00	0.00	0.00	0.00	0.00	0.00
Feb	0.00	0.00	0.00	0.00	0.00	0.00
Mar	0.00	0.00	0.00	0.00	0.00	0.00
Apr	0.00	0.00	0.00	0.00	0.00	0.00
May	0.00	0.00	0.00	0.00	0.00	0.00
Jun	0.00	0.00	0.00	0.00	0.00	0.00
Jul	0.00	0.00	0.00	0.00	0.00	0.00
Aug	0.00	0.00	0.00	0.00	0.00	0.00
Sep	0.00	0.00	0.00	0.00	0.00	0.00
Oct	0.00	0.00	0.00	0.00	0.00	0.00
Nov	0.00	0.00	0.00	0.00	0.00	0.00
Dec	0.00	0.00	0.00	0.00	0.00	0.00
...	0.00	0.00	0.00	0.00	0.00	0.00
..Jan	0.00	0.00	0.00	0.00	0.00	0.00

Top	Prev	Next	Bottom	Search	Save	Exit

Similarly from the screen we can view and update the monthly
Overtime data breakdown details.

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Generate YearToDate Figures

The first option in the **Yearly** section allows us to generate **YTD** payroll data of the employee. This option is used after we have done and complete the previous **Update Monthly Figure** option.
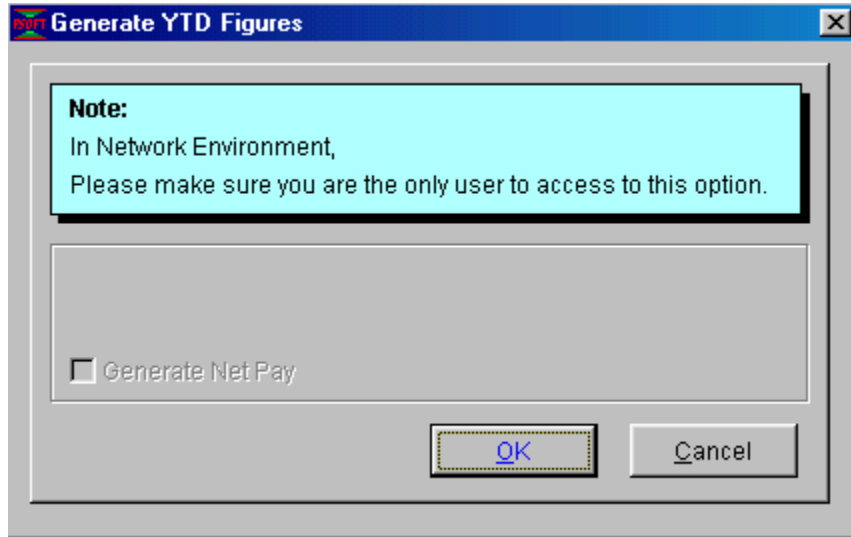
Once we select this option the above dialog box will appear for us to confirm processing to generate year to date figure.

After generating the above YTD data, we can then proceed to the next option, ie the third option in the **Yearly Menu : Year to Date Pay Reports.** These reports are grouped as shown in the next screen:

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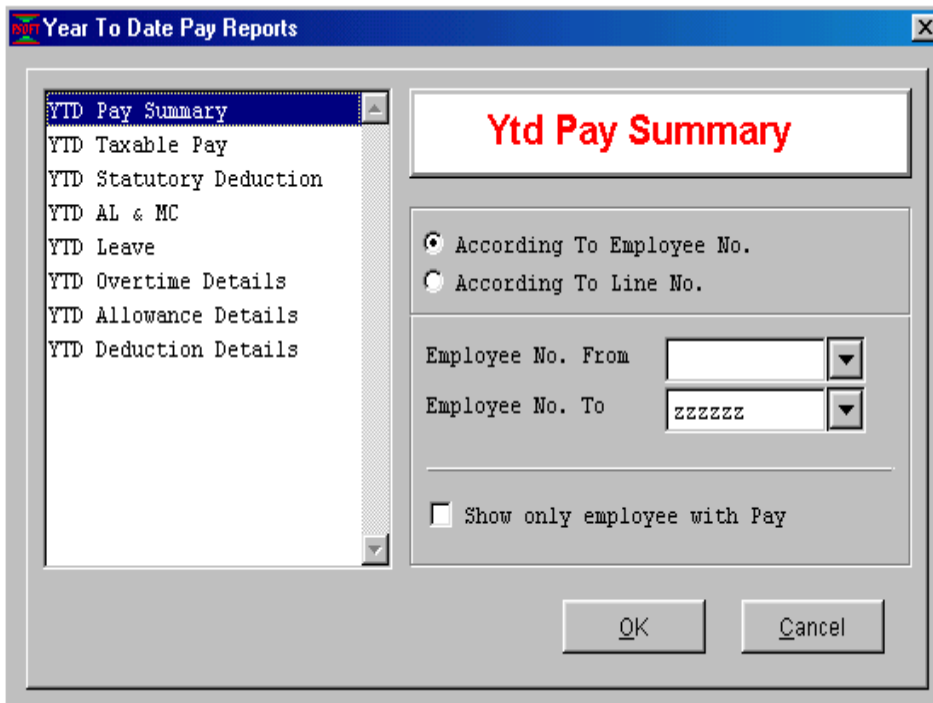
Notice from the above screen that we can have the following reports:

YTD Pay Summary
YTD Taxable Pay
YTD Statutory Deduction
YTD Annual Leave & Medical Leave
YTD Leave
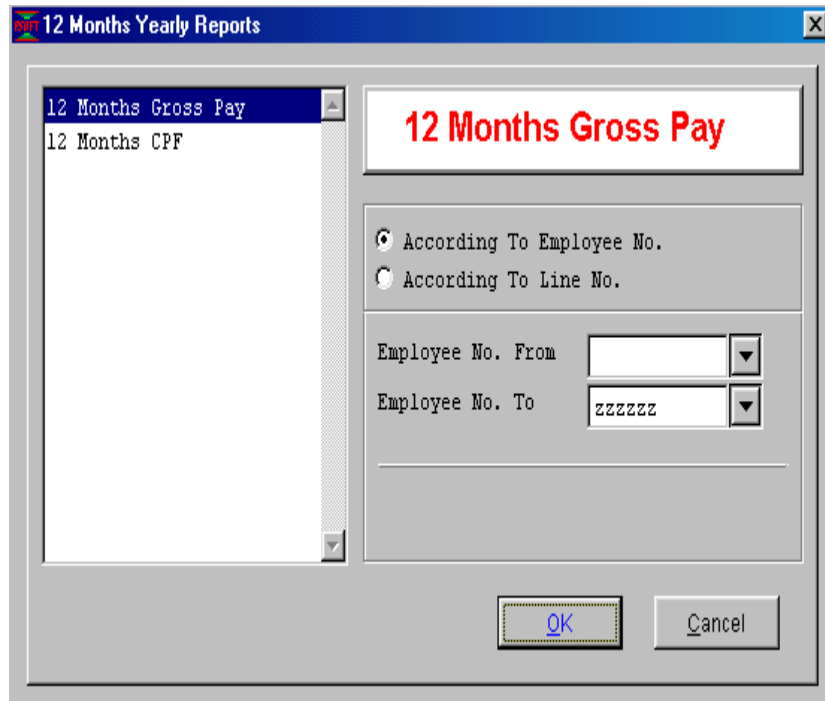YTD Overtime Details
YTD Allowances Details
YTD Deductions Details

We may select to print the report according to the employee number or line number. Tick the box if we want to print only those employee with pay.

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A sample report of the YTD Employee Pay is as shown:

Year To Date Pay Reports

Ytd Pay Summary

EMPLOYEE NUMBER	<----------------------- YEAR TO DATE PAY ----------------------->						
	BASIC	OVERTIME	ALLOWANCE	DIR.FEE	GROSS	BONUS	COMM.
DF0001	4200.00	0.00	0.00	0.00	4200.00	0.00	0.00
DH0001	7300.00	0.00	0.00	0.00	7300.00	0.00	0.00
DH0002	3900.00	0.00	0.00	0.00	3900.00	0.00	0.00
DL0001	5200.00	0.00	0.00	0.00	5200.00	0.00	0.00
FWA001	500.50	0.00	0.00	0.00	500.50	0.00	0.00
FWR001	200.00	0.00	0.00	0.00	200.00	0.00	0.00
LWF001	450.00	0.00	0.00	0.00	450.00	0.00	0.00
LWF002	670.00	0.00	0.00	0.00	670.00	0.00	0.00
LWF003	300.00	0.00	0.00	0.00	300.00	0.00	0.00
MWA001	600.00	0.00	0.00	0.00	600.00	0.00	0.00
MWG001	1020.00	0.00	0.00	0.00	1020.00	0.00	0.00
MWM001	1256.60	0.00	0.00	0.00	1256.60	0.00	0.00
SA0001	5530.00	0.00	0.00	0.00	5530.00	0.00	0.00
SJ0001	1100.00	0.00	0.00	0.00	1100.00	0.00	0.00
SM0001	1200.00	0.00	0.00	0.00	1200.00	0.00	0.00
SR0001	880.00	0.00	0.00	0.00	880.00	0.00	0.00

Preview   Printer   Customize   -> Excel   Exit

12-Month Gross Figures

The last option in the **Yearly** section allows us **to 12-Month** payroll data of the employee. The dialog box will appear for us to select:

We may select to print the report according to the employee number or line number. Tick the box if we want to print only those employee with pay.

A sample report of the 12-month Employee Gross Pay is as shown:

12 Months Yearly Reports							☒

12 Months Gross Pay

EMP. NO.	LINE NO.	JAN/ JUL	FEB/ AUG	MAC/ SEP	APR/ OCT	MAY/ NOV	JUN/ DEC	TOTAL/ AVG
DF0001	D	0.00	0.00	0.00	0.00	4200.00	0.00	4200.00
		0.00	0.00	0.00	0.00	0.00	0.00	
DH0001	D	0.00	0.00	0.00	0.00	7300.00	0.00	7300.00
		0.00	0.00	0.00	0.00	0.00	0.00	
DH0002	D	0.00	0.00	0.00	0.00	3900.00	0.00	3900.00
		0.00	0.00	0.00	0.00	0.00	0.00	
DL0001	D	0.00	0.00	0.00	0.00	5200.00	0.00	5200.00
		0.00	0.00	0.00	0.00	0.00	0.00	
FWA001	P	0.00	0.00	0.00	0.00	500.50	0.00	500.50
		0.00	0.00	0.00	0.00	0.00	0.00	
FWR001	P	0.00	0.00	0.00	0.00	200.00	0.00	200.00

Preview	Printer	Customize	-> Excel	Exit

Notice that in the above report, it means only one month ie May the employees' pay is calculated so far.