

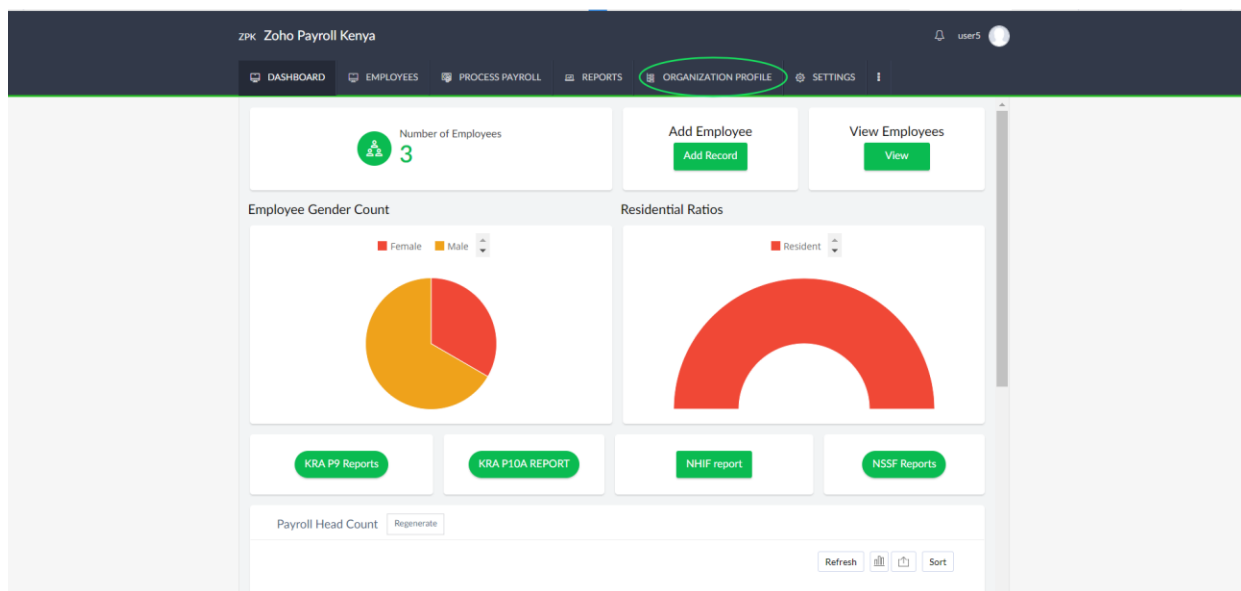
ZOHO PAYROLL KENYA GUIDE

This guide provides a step-by-step walkthrough on how to navigate through the Kenyan Payroll System. It is divided into two main sections: the Admin Guide and the User Guide. Both sections aim to provide clear instructions that will help admins and users understand and efficiently use the system.

ADMIN GUIDE

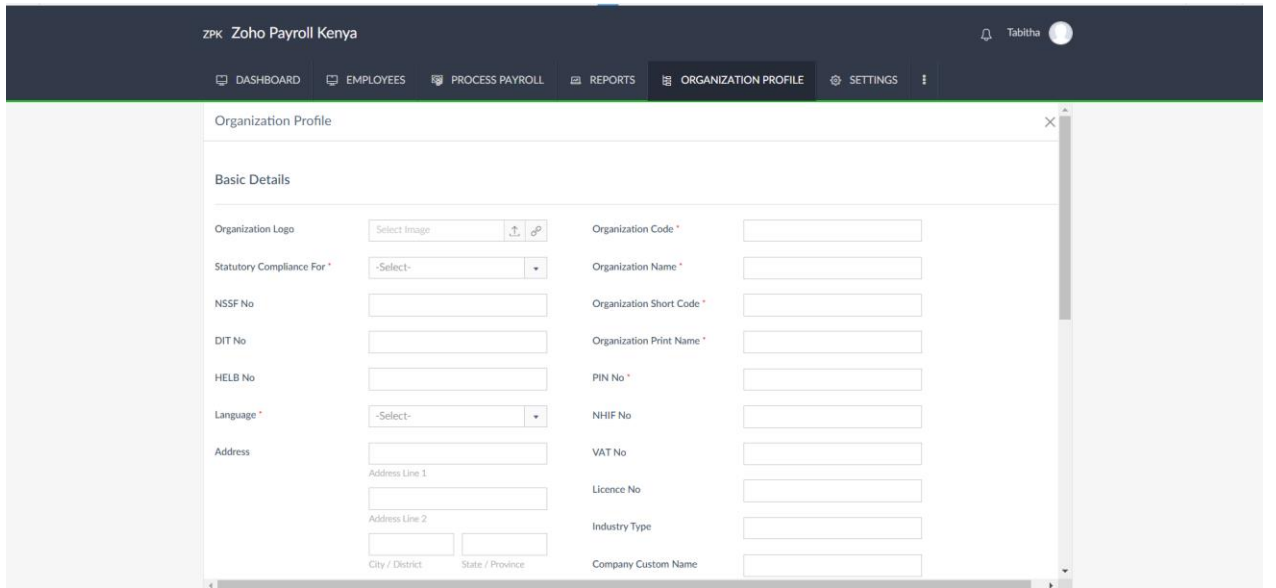
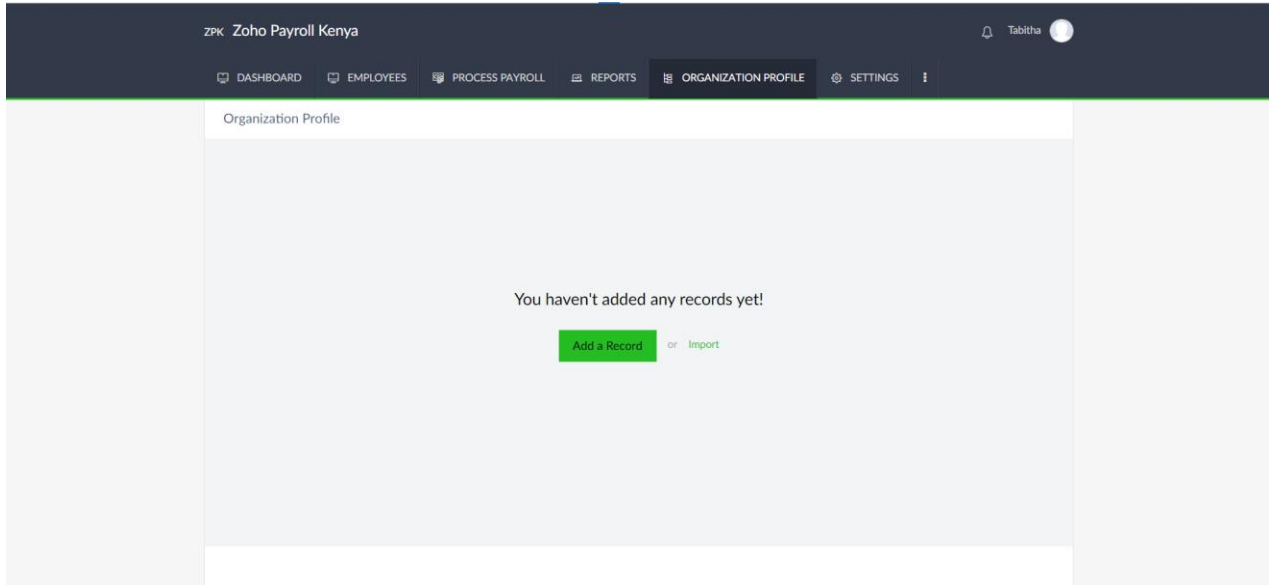
ORGANIZATION PROFILE

In this payroll system, the Organization Profile module allows users to setup, manage, and customize the details of their organization.



Users can perform the following actions:

- a. **Add Organization details.**
- b. **Edit organization details.**

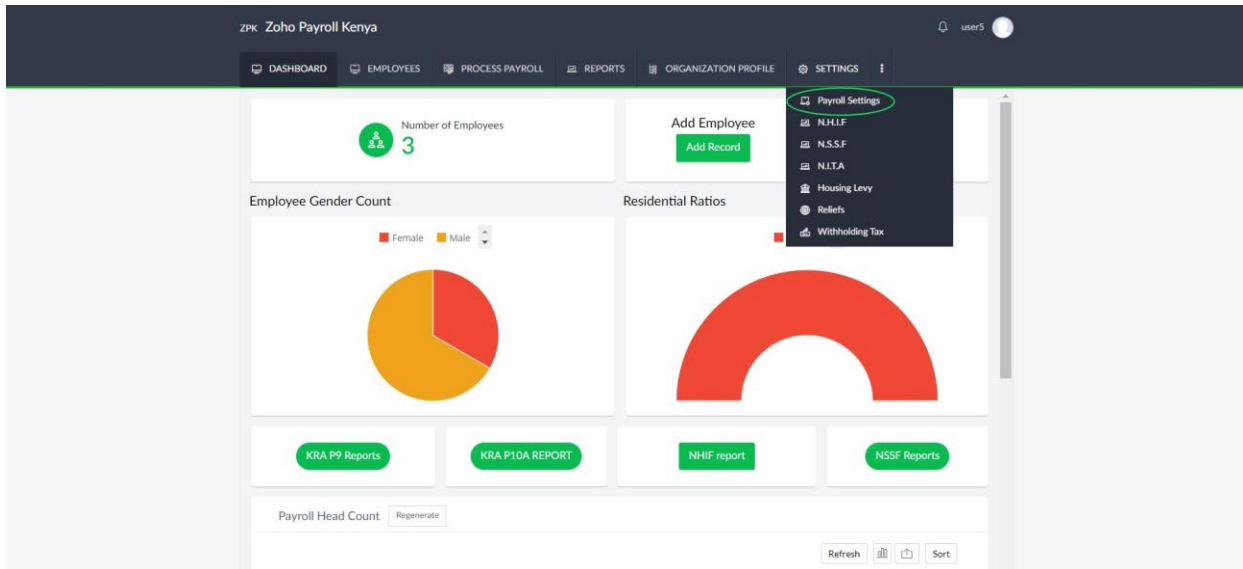


2. SETTINGS

1.1. PAYROLL SETTINGS

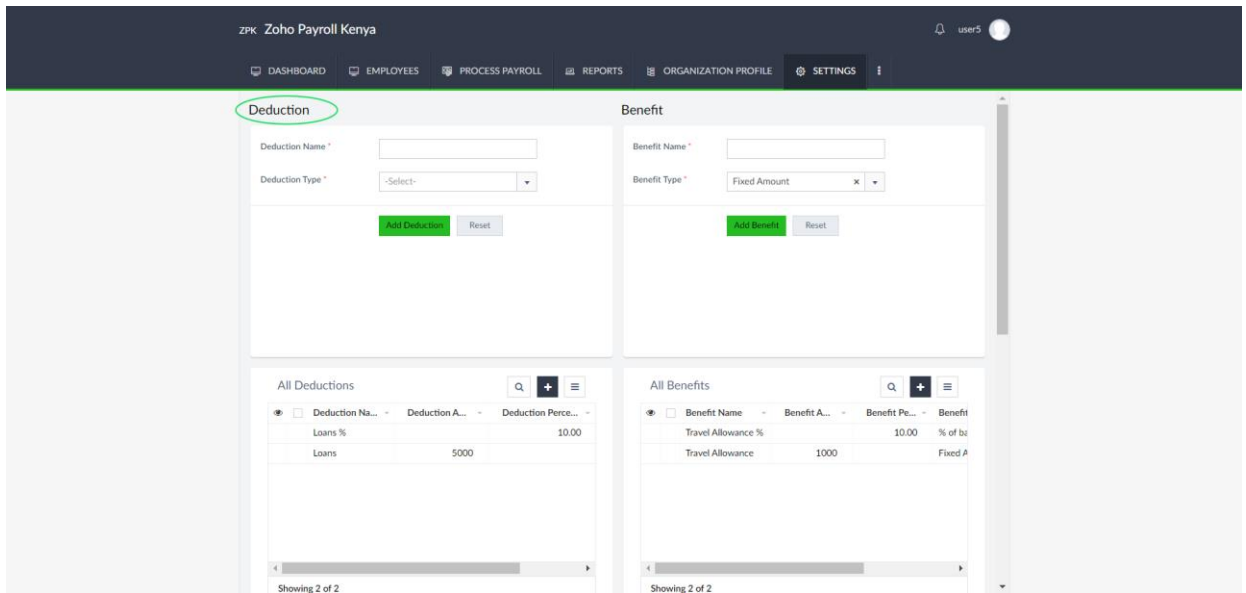
The Payroll Settings module enables users to manage various deductions and benefits applicable to their employees. This module helps in ensuring accurate payroll calculations and compliance with relevant regulations.

Navigate to **Settings > Payroll Settings**.



Here, you can add various “deductions” and “benefits” that will automatically be calculated during payroll processing.

a. Add Deduction



1. From the payroll settings page, navigate to the Deduction section.
2. Fill in the necessary information.
3. Click “Add Deduction” to create a new deduction type or Click “Reset” to clear the form.
4. View new deduction in the “All deductions” table on the same page.

b. Add Benefit

The screenshot shows the Zoho Payroll Kenya interface. The navigation bar at the top includes 'ZPK Zoho Payroll Kenya' and 'user5'. The main content area is divided into two columns: 'Deduction' and 'Benefit'. The 'Benefit' section is circled in red. Below the forms are two tables: 'All Deductions' and 'All Benefits'.

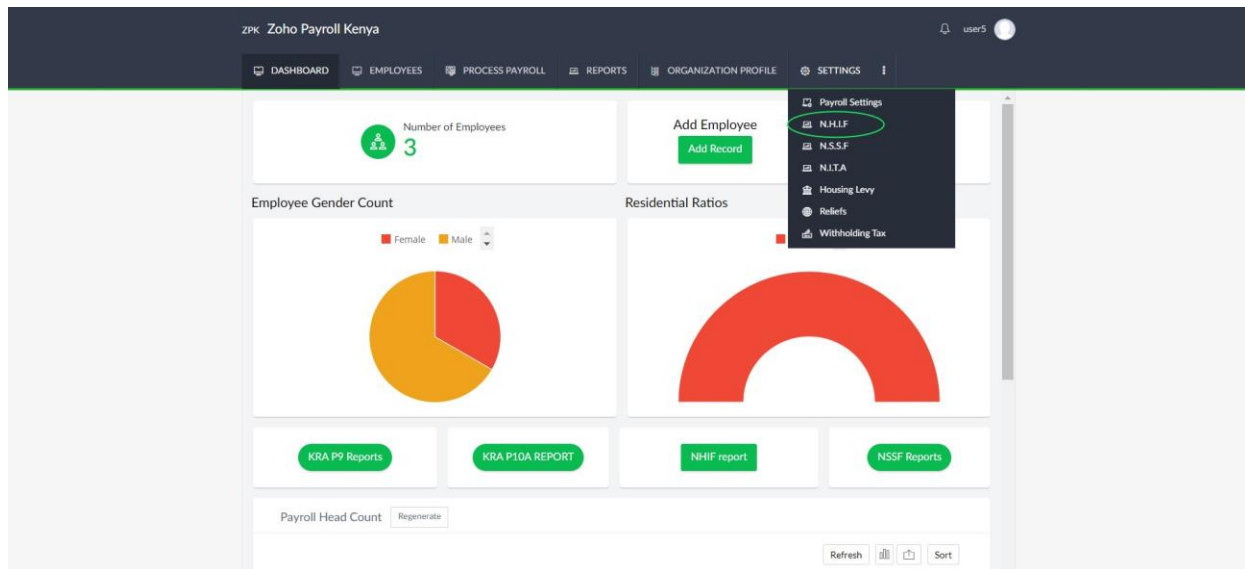
All Deductions		
Deduction No...	Deduction A...	Deduction Perce...
Loans %		10.00
Loans	5000	

All Benefits			
Benefit Name	Benefit A...	Benefit Pe...	Benefit
Travel Allowance %		10.00	% of bs
Travel Allowance	1000		Fixed A

1. From the payroll settings page, navigate to the Benefit section.
2. Fill in the necessary information.
3. Click “Add Benefit” to create a new benefit type or Click “Reset” to clear form and enter new information.
4. View created benefit in the “All Benefits” table on the same page.

1.2. NHIF

- The NHIF (National Hospital Insurance Fund) settings in the payroll system allow users to see the contribution rates and rules in accordance with the NHIF requirements.



- The payroll system is configured to handle these calculations automatically.

1.3. N.S.S.F

This will display the current NSSF rates and rules that the system uses to calculate NSSF deductions. In our payroll system, the NSSF settings are pre-configured and automated to calculate the necessary deductions according to the rates set by the NSSF.

1.4. N.I.T.A

This will display the current NITA rates and rules that the system uses to calculate NITA deductions. In our payroll system, the NITA settings are pre-configured and automated to calculate the necessary deductions according to the rates set by the NITA.

1.5. House Levy

This will display the current House Levy rates and rules that the system uses to calculate House Levy deductions. In our payroll system, the House Levy settings are pre-configured and automated to calculate the necessary deductions according to the Kenyan Constitution.

1.6. Reliefs

This will display the current reliefs rates and rules that the system uses to calculate reliefs rates. In our payroll system, the reliefs settings are pre-configured and automated to calculate the necessary deductions according to the Kenyan Constitution.

1.7. Withholding Tax.

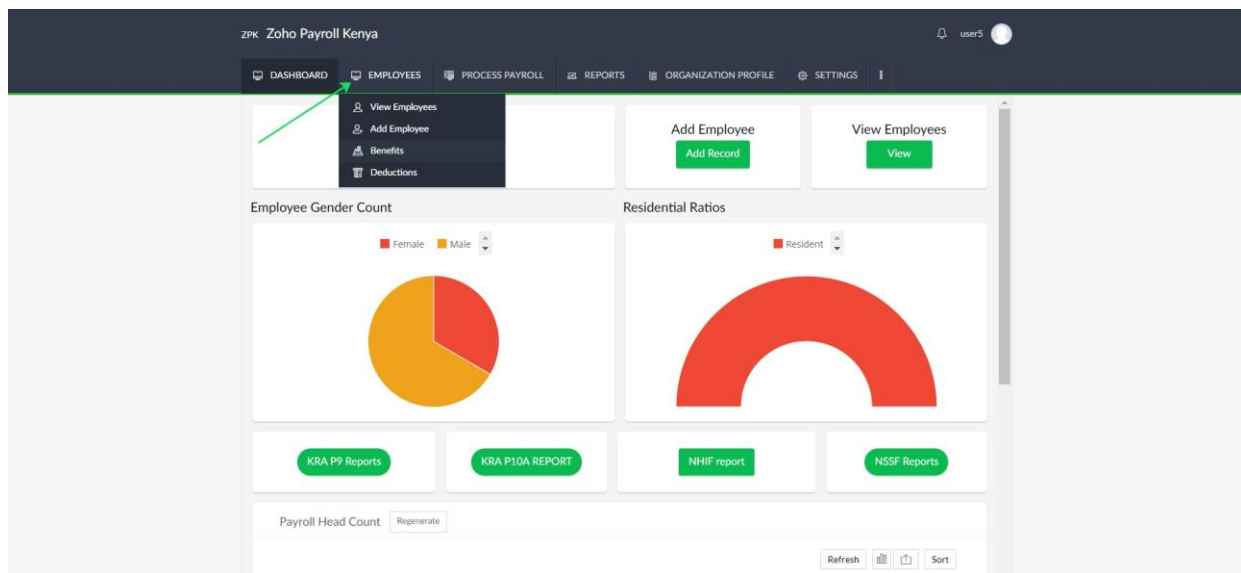
This will display the current withholding tax rates and rules that the system uses to

calculate withholding tax rates. In our payroll system, the reliefs settings are pre-configured and automated to calculate the necessary deductions according to the Kenyan Constitution.

3. EMPLOYEE MANAGEMENT

The Employee module in the system enables users to manage comprehensive employee information.

The module provides users with the ability to view, add, and modify employee details, as well as manage employee deductions and benefits.



a. View Employee

Users can view a comprehensive list of all employees within the organization, along with their personal and professional details.

Navigate to **Employees > View Employee**

b. Add Employee

Users can add new employees to the system, including their personal and professional information.

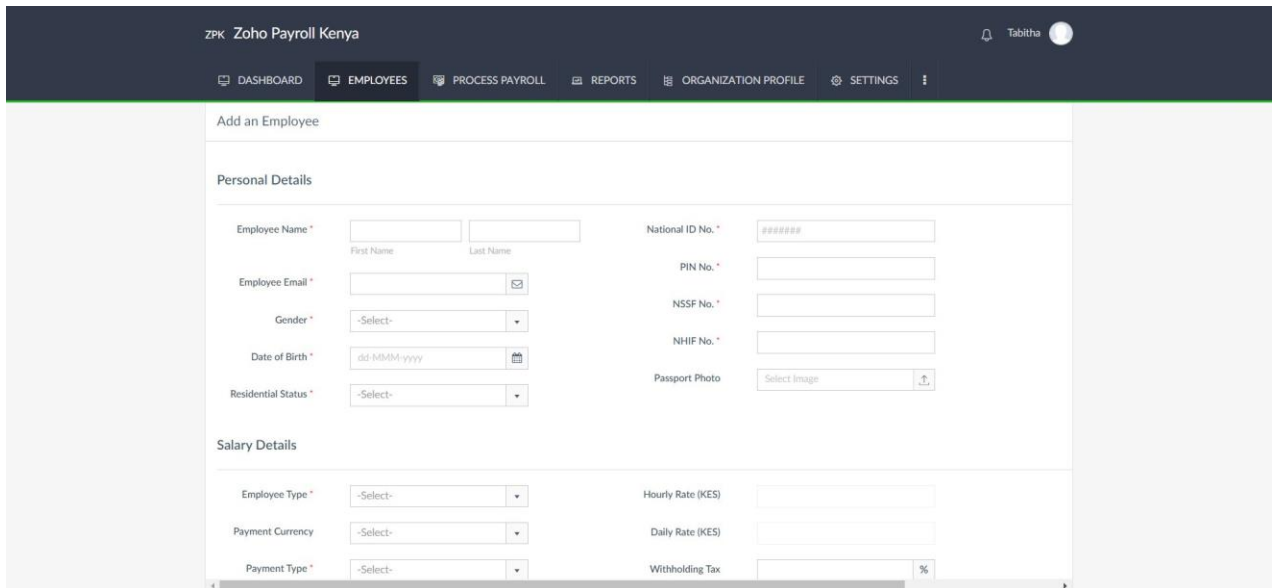
Navigate to **Employees > Add Employee**

The payroll system provides three methods to add employees:

I. Manually Adding Employees:

In this method, you manually input the employee's details into the system.

1. Navigate to Employees > Add Employees
2. Fill in employee information.
3. Click the "Submit" button to save the information or click "Reset" to clear the form.

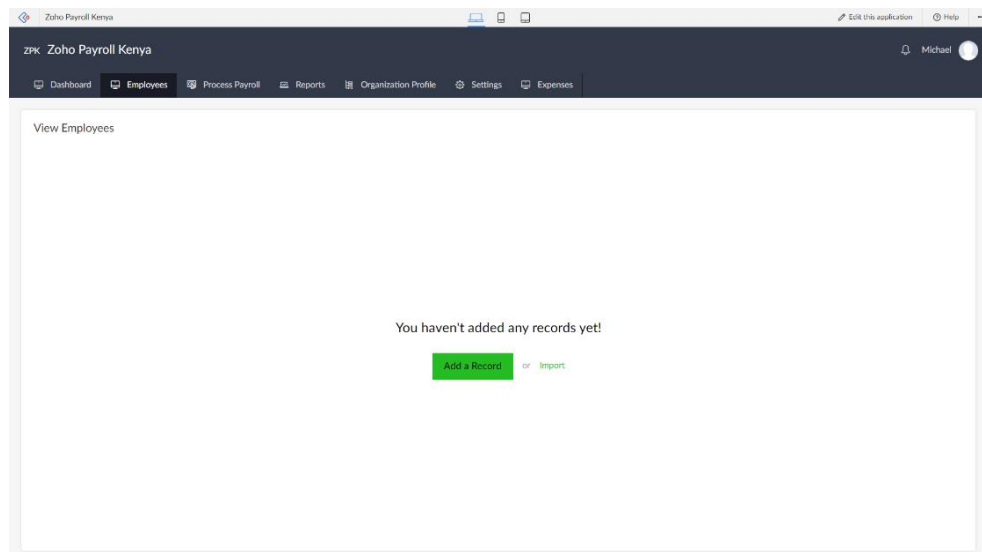


The screenshot shows the 'Add an Employee' form in the Zoho Payroll Kenya system. The form is divided into two main sections: 'Personal Details' and 'Salary Details'. The 'Personal Details' section includes fields for Employee Name (split into First Name and Last Name), Employee Email, Gender, Date of Birth, Residential Status, National ID No., PIN No., NSSF No., NHIF No., and Passport Photo. The 'Salary Details' section includes fields for Employee Type, Payment Currency, Payment Type, Hourly Rate (KES), Daily Rate (KES), and Withholding Tax.

II. Importing Employee Information:

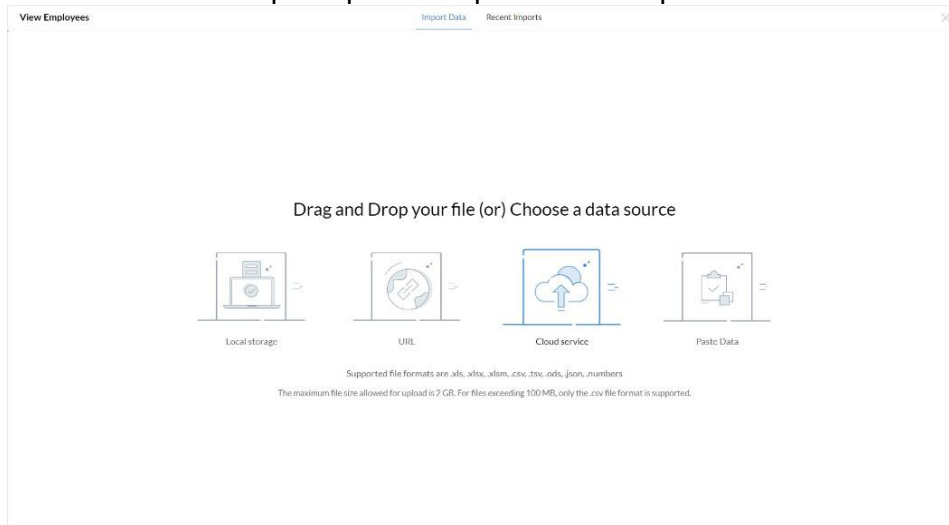
This method involves importing a file (often a CSV or Excel file) that contains the employee's details. This is often used when there are a large number of employees to add at once.

1. Navigate to **Employees > Add Employee**
2. Select the import option.

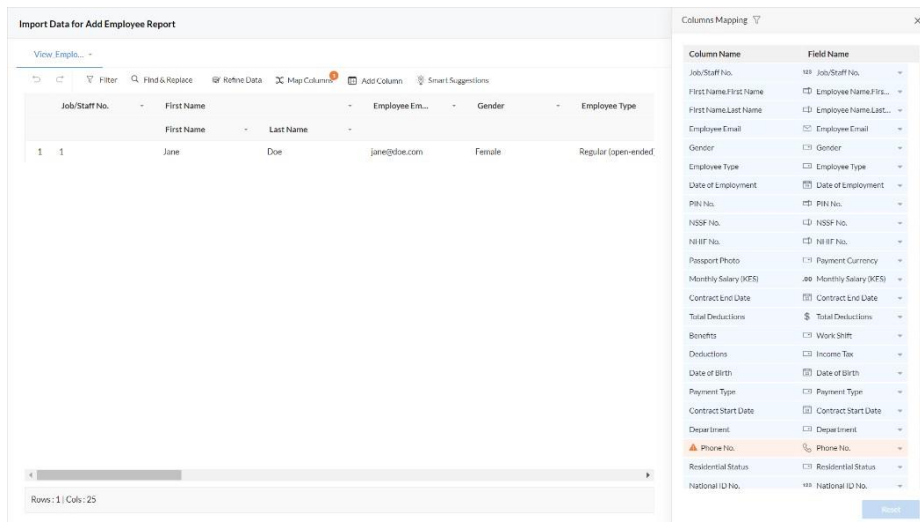


The screenshot shows the 'View Employees' page in the Zoho Payroll Kenya system. The page displays a message: "You haven't added any records yet!". Below the message, there are two buttons: "Add a Record" and "Import".

3. Select the desired import option and provide the required details.



4. The provided details are then displayed, where you are supposed to map them correctly with the Organization details fields.



5. After correct mapping, click the "import" button to perform the import action.

Import Data for Add Employee Report

Sheet1 - Settings Import Cancel

Filter Find & Replace Refine Data Map Columns Add Columns Smart Suggestions

	first_name	company_name	address	state	zip	ph			
	First Name	last_name	Address Line 1	city	county				
1	James	Butt	Benton, John B Jr	6649 N Blue Gum St	New Orleans	Orleans	LA	70116	50
2	Josephine	Darakjy	Chanay, Jeffrey A Esq	4 B Blue Ridge Blvd	Brighton	Livingston	MI	48116	81
3	Art	Venere	Chemel, James L Cpa	8 W Cerritos Ave #54	Bridgeport	Gloucester	NJ	8014	85
4	Lenna	Paprocki	Feltz Printing Service	639 Main St	Anchorage	Anchorage	AK	99501	90
5	Donette	Foller	Printing Dimensions	34 Center St	Hamilton	Butler	OH	45011	51
6	Simona	Morasca	Chapman, Ross E Esq	3 Mcauley Dr	Ashland	Ashland	OH	44805	41
7	Mitsue	Tollner	Morlong Associates	7 Eads St	Chicago	Cook	IL	60632	77
8	Leota	Dilliard	Commercial Press	7 W Jackson Blvd	San Jose	Santa Clara	CA	95111	40
9	Sage	Wieser	Truhlar And Truhlar Attys	5 Boston Ave #88	Sioux Falls	Minnehaha	SD	57105	60
10	Kris	Marrier	King, Christopher A Esq	228 Runamuck Pl #2808	Baltimore	Baltimore City	MD	21224	41
11	Minna	Amigon	Dori, James J Esq	2371 Jerrold Ave	Kulpsville	Montgomery	PA	19443	21
12	Abel	Maclead	Rangoni Of Florence	37275 St Rt 17m M	Middle Island	Suffolk	NY	11953	63
13	Kiley	Caldarera	Feiner Bros	25 E 75th St #69	Los Angeles	Los Angeles	CA	90034	31
14	Graciela	Ruta	Buckley Miller & Wright	98 Connecticut Ave Nw	Chagrin Falls	Geauga	OH	44023	44
15	Cammy	Albares	Rousseaux, Michael Esq	56 E Morehead St	Laredo	Webb	TX	78045	95

Rows: 99 | Cols: 11

6. Progress of imports will then be shown on the window that pops up.

1%

Data Import is in Progress...

Meanwhile, you can access the application. It is recommended not to edit the application while the data is imported, as it might interrupt the process.

0 records has been imported

Access Application View Import Status

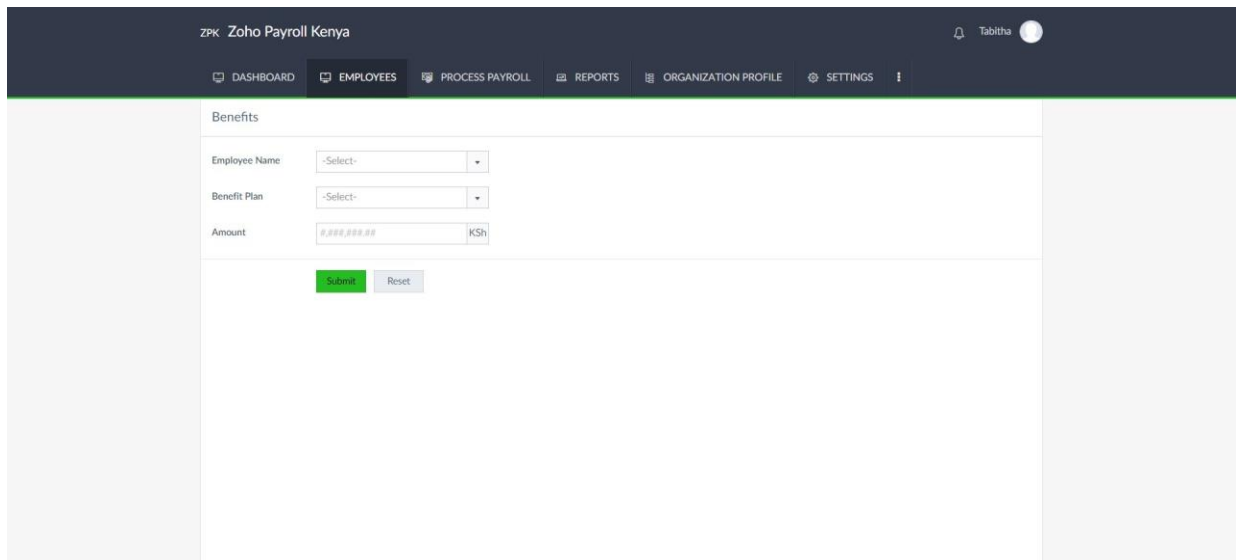
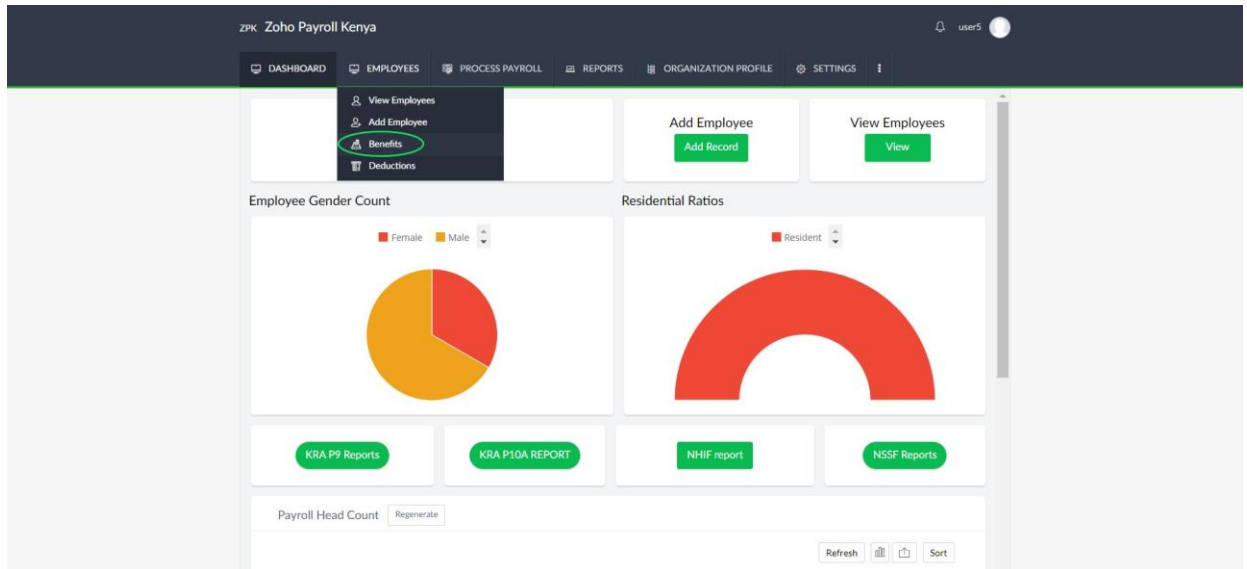
7.

III. Integrating with a Third-Party Source:

This option involves setting up an integration with a third-party system, such as Zoho People, to fetch and sync employee data.

c. Add Benefits

Users can assign benefits to employees, such as health insurance, retirement plans, and other employee benefits that will be used when processing employee payroll.

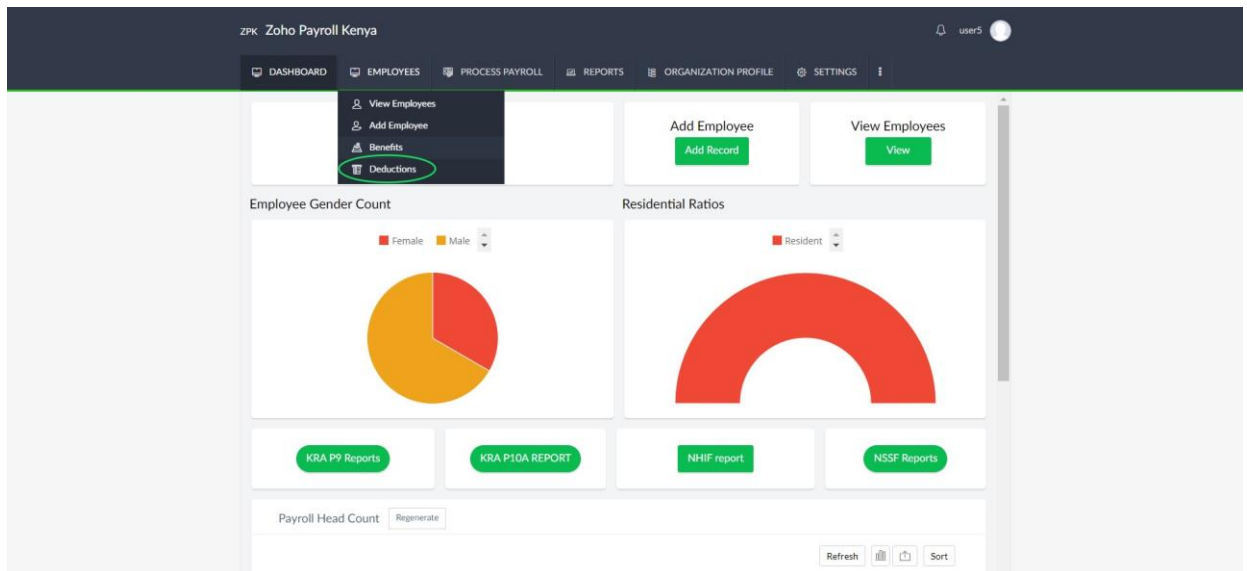


1. Navigate to **Employees > Benefit**.
2. Select the employee from the drop-down list to apply the benefit.
3. Select the benefit type from the drop-down list of existing benefits.
4. The amount input field is automatically calculated and autofilled based on the plan selected.

d. Add Deductions

The module allows users to assign deductions to employees, which can include taxes, social security contributions, and other employee deductions which will be used during processing employee payroll.

1. Navigate to **Employees > Deductions**.
2. Select the employee from the drop-down list to apply the deduction.
3. Select the deduction type from the drop-down list of existing deductions.
4. The amount input field is automatically calculated and autofilled based on the plan selected.



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Tabitha

DASHBOARD EMPLOYEES PROCESS PAYROLL REPORTS ORGANIZATION PROFILE SETTINGS

Deductions

Employee Name:

Deduction Plan:

Amount: KSh

Deduct before Taxing?

4. PAYROLL PROCESSING.

The "Process Payroll" module helps streamline employee payroll processing.

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user5

DASHBOARD EMPLOYEES **PROCESS PAYROLL** REPORTS ORGANIZATION PROFILE SETTINGS

Number of Employees

3

Add Employee

View Employees

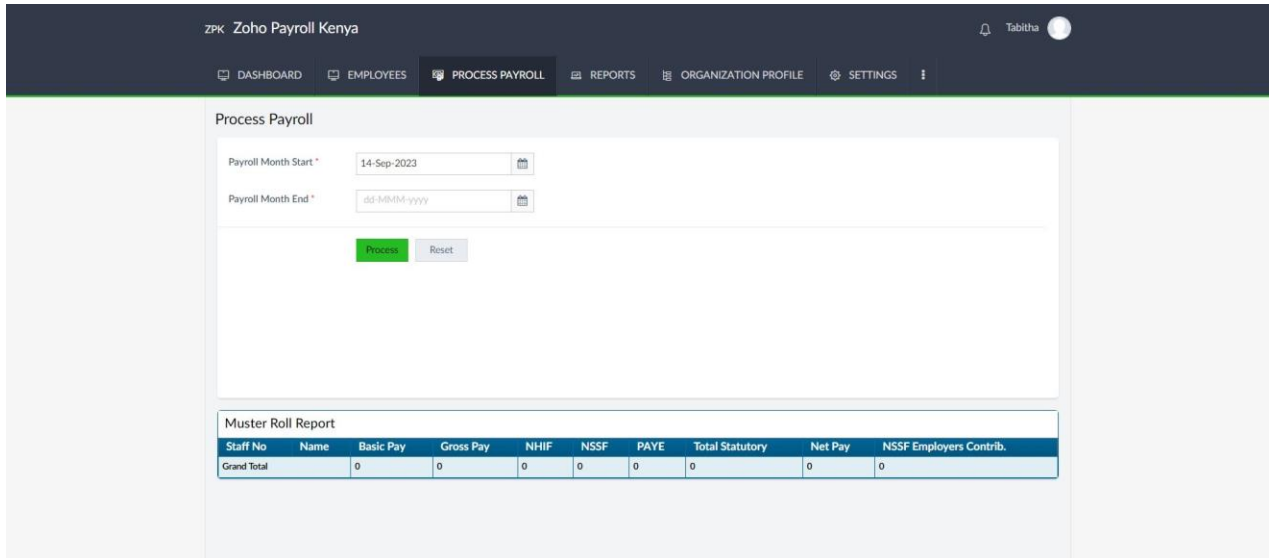
Employee Gender Count

Female Male

Residential Ratios

Resident

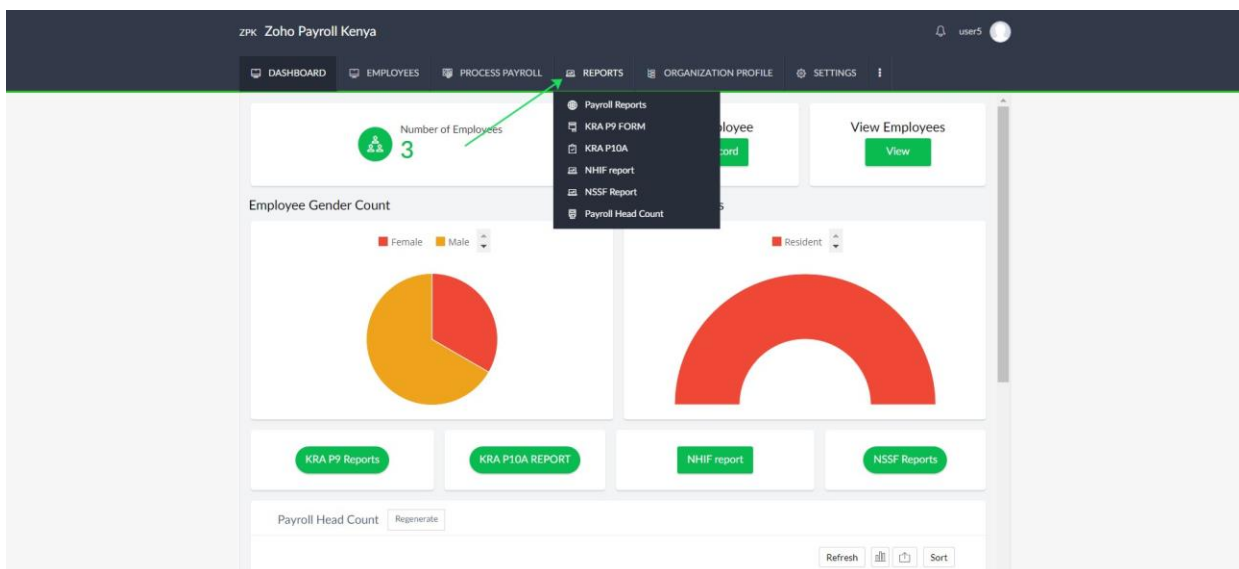
Payroll Head Count



1. Navigate to Process Payroll
2. Enter the payroll month start date and payroll month end date.
 - This determines the time frame for processing payroll for all employees.
3. Click "Process" to proceed to processing employee's pay or click "Reset" to clear the form and enter new values.

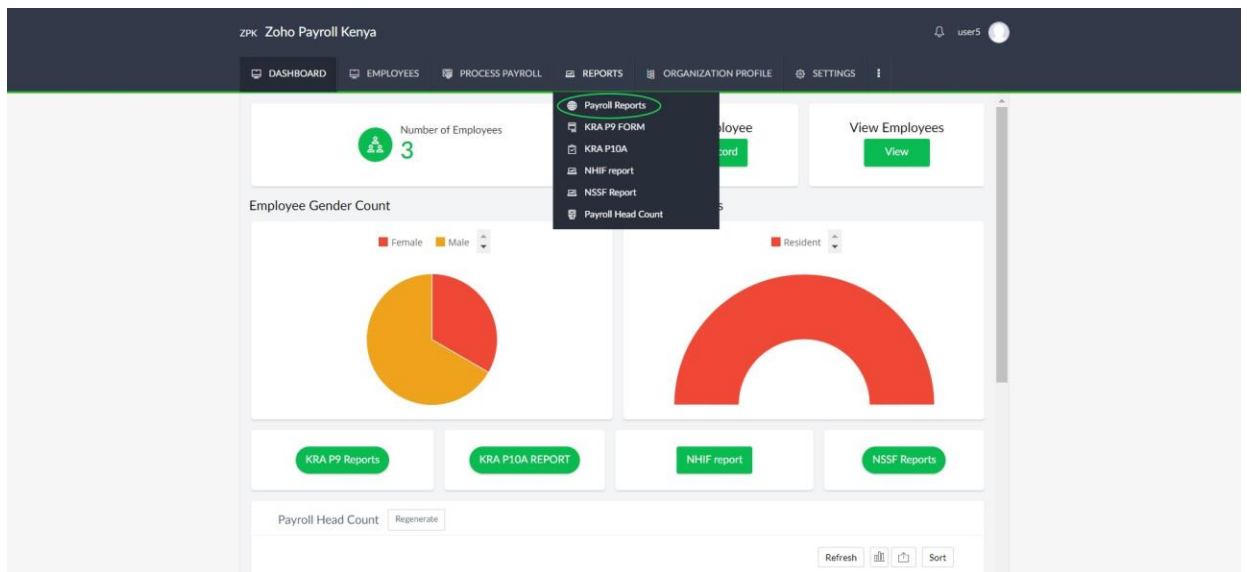
5. REPORTS

The Reports module provides a centralized location to generate various types of reports related to different aspects of payroll management. This module typically includes sub-modules or sections that cater to specific report types.



a. Payroll Reports

Navigate to **Reports > Payroll Reports**



The Payroll Reports generate payment summaries/pay slips for each employee for specific periods. Additionally, from the generated reports you can perform the following actions:

- Send Pay slips via Email: This feature enables you to send pay slips directly to individual employees via email.
- Print Pay slips: The system provides an option to print each individual pay slip. This allows you to generate a hard copy of the pay slip for record-keeping purposes or if an employee prefers a physical copy.

b. KRA P9 Forms Reports

The KRA P9 Form report displays employees' earnings and a breakdown of the taxes deducted from their income.

To view employee's KRA P9 Form.

1. Navigate to **Report > KRA P9 Forms**
2. Provide an employee's KRA Pin for which you want to view.
3. Click "Generate" to generate the KRA P9 Form of the specific employee or "Reset" to clear the form and key in new details.
4. To print the generated form, click on the "Print" button or if you need a PDF, click on the "PDF" button to download the form as PDF.

Print PDF

KRA PIN:

KENYA REVENUE AUTHORITY
DOMESTIC TAXES DEPARTMENT
 TAX DEDUCTION CARD YEAR: 2023
 APPROVAL NUMBER:

Employer Name: XYZ Company Employer PIN: 123442
 Employee Main Name: John Doe Employee PIN: A123467899K

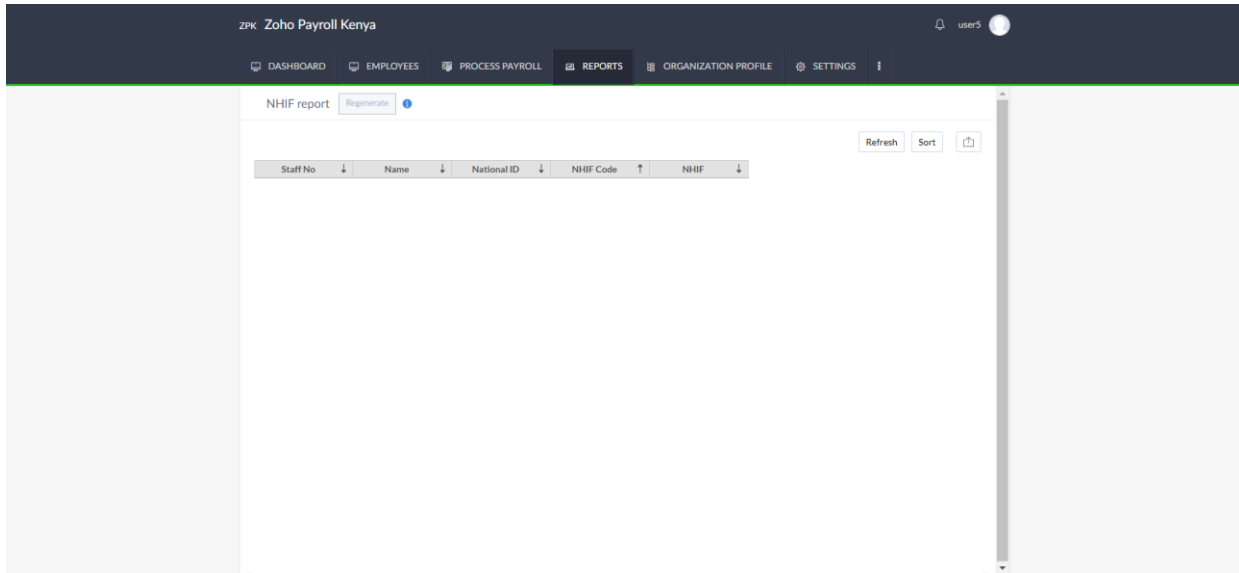
MONTH	Basic Salary	Benefits-Non-Cash	Value Of Quarters	Gross Pay	Defined Contribution Retirement Scheme			Owner-Occupied Interest	Retirement Contribution & Owner-Occupied Interest	Chargeable Pay	Tax Charged	Personal Relief	Insurance Relief	PAYE Tax (J-K)
					E1 30% of A	E2 Actual	E3 Fixed							
A	B	C	D	E	F	G	H	J	K1	K2	K Total		L	
Jan	30000.00	0.00	0.00	30000.00	9000.000	200.00	20000.00	0.00	135.0000	28920.00	3630.00	2400	135.0000	1095
May	30000.00	0.00	0.00	30000.00	9000.000	200.00	20000.00	0.00	135.0000	28920.00	3630.00	2400	135.0000	1095
Aug	30000.00	0.00	0.00	30000.00	9000.000	200.00	20000.00	0.00	135.0000	28920.00	3630.00	2400	135.0000	1095
Sep	30000.00	0.00	0.00	30000.00	9000.000	200.00	20000.00	0.00	135.0000	28920.00	3630.00	2400	135.0000	1095
Totals	120000.00	0.00	0.00	120000.00	36000.000	800.00	80000.00	0.00	540.0000	115680.00	14520.00	10140.0000	4380.00	

c. KRA P10 Reports

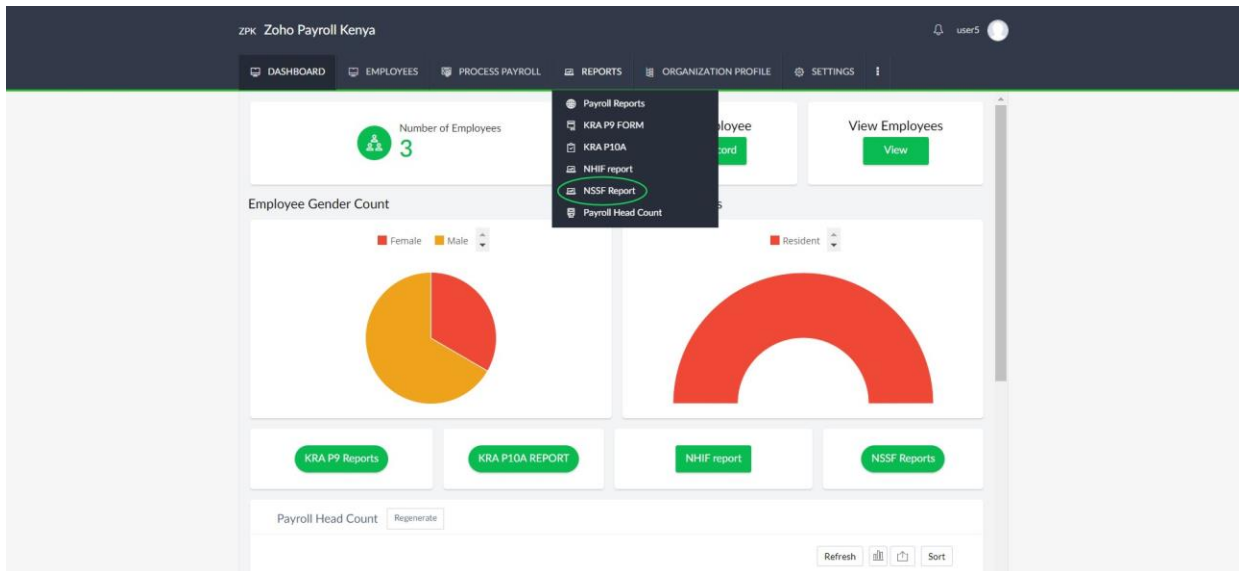
1. Navigate to Reports > KRA P10 Reports
2. View all individual KRA P10 reports for the employees.
3. To print, click on individual KRA P10, then click on the "Print" button.

d. NHIF Reports

The screenshot shows the Zoho Payroll Kenya dashboard. At the top, there are navigation tabs: DASHBOARD, EMPLOYEES, PROCESS PAYROLL, REPORTS, ORGANIZATION PROFILE, and SETTINGS. The 'REPORTS' tab is active, and a dropdown menu is open, listing various report types: Payroll Reports, KRA P9 FORM, KRA P10A, NHIF report (highlighted with a red circle), NSSF Report, and Payroll Head Count. Below the menu, the dashboard displays several widgets: 'Number of Employees' (3), 'Employee Gender Count' (a pie chart showing Female and Male), 'Resident' (a gauge chart), and buttons for 'KRA P9 Reports', 'KRA P10A REPORT', 'NHIF report', and 'NSSF Reports'. At the bottom, there is a 'Payroll Head Count' section with a 'Regenerate' button and 'Refresh', 'Print', and 'Sort' icons.



e. NSSF Reports



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DASHBOARD EMPLOYEES PROCESS PAYROLL **REPORTS** ORGANIZATION PROFILE SETTINGS

NSSF Report Regenerate

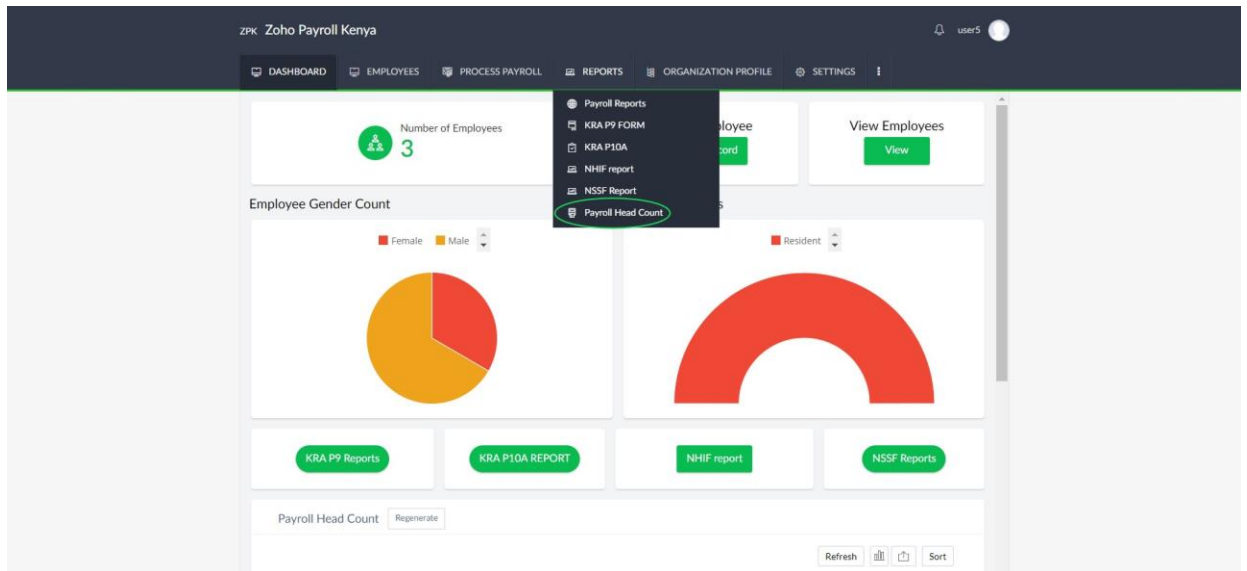
Name	NSSF	National ID	KRA Pin	NSSF Code	Gross Pay
John Doe	1080.00	12345600	A123467899K	123456789	30000.00
Mary Ann	1080.00	37829387	A233134232G	432345324356	25000.00
Test Employee	0	12345678	A123456789K	12345678	31000.00

Refresh Sort

f. Payroll Headcount Report

This metric basically shows how many people are engaged in the payroll process in comparison to the total number of employees.

It is automatically generated by the system.



Payroll Head Count

Regenerate

Refresh   Sort

