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Salary Packaging Toolkit

User guide

Contents

System Requirements

Installation

Getting Started

Main Menu

Help

The Development Process

Navigation

The Menu Bar

Frequently Asked Questions

Customer Support

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System Requirements

Salary Packaging Toolkit is supported on systems with the following minimum requirements:

- Microsoft Windows 2000 or above with the latest service packs.
- Microsoft Office (Excel & Word) 2000 or above with the latest service packs.
- The minimum hardware recommended for your versions of MS Windows and Office.
- Screen resolution 1024 x 768 and above.
- Adobe Acrobat Reader.

Installation

To install *Salary Packaging Toolkit*, place your CD into the appropriate drive.

The installer should start automatically, unless Autorun is disabled on your system. If you need to start the installer manually:

From the Windows **Start** menu, select **Run** and enter the installation command:
Driveletter:\SETUP.

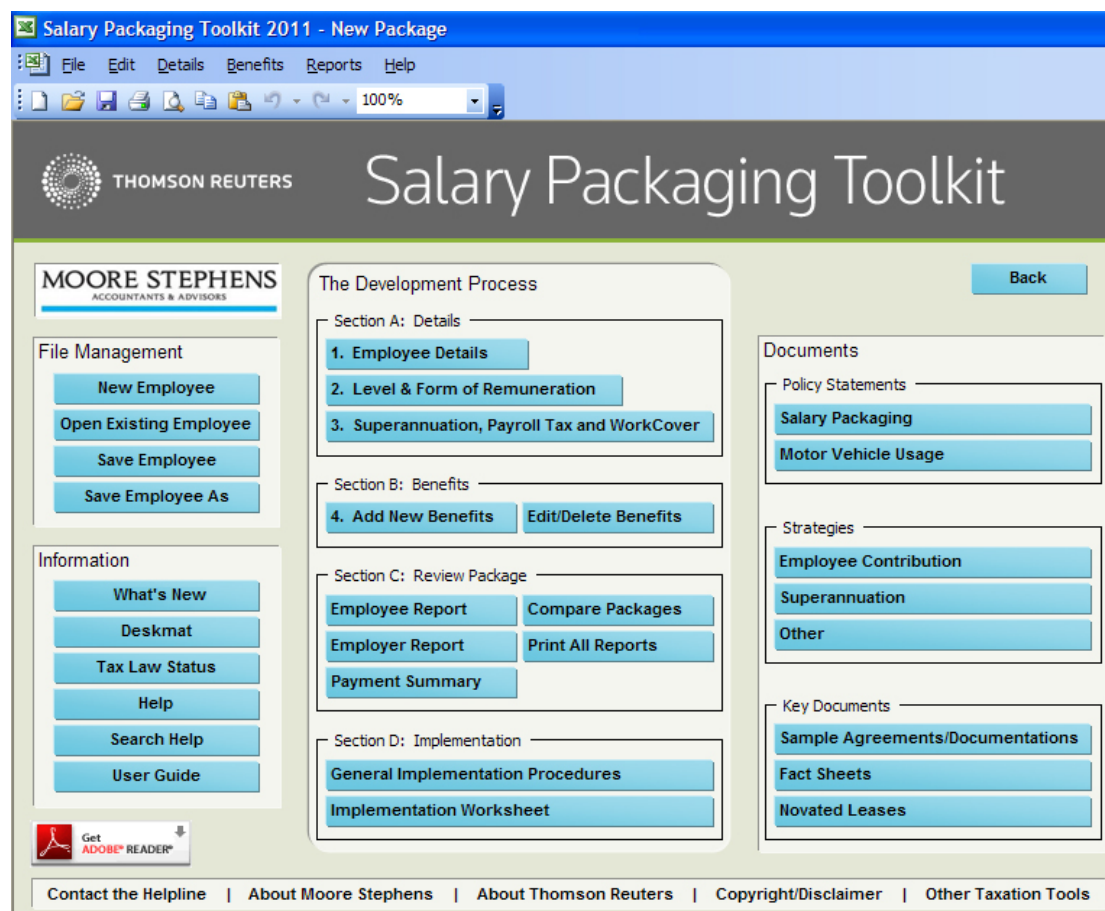
The *Driveletter* will be your CD/DVD drive identification letter, eg D:\SETUP.

Once the installer is running, follow the on-screen prompts, providing information where required.

Getting Started

After installing *Salary Packaging Toolkit*, you can start it from the Windows **Start** menu, by selecting **Programs**, then **CPD Business Tools**, then **Salary Packaging Toolkit – yyyy** (“yyyy” = the year). Note that previous years’ versions of *Salary Packaging Toolkit* will remain available in the Start menu, so be sure to choose the one you want.

Main Menu




The main menu items are grouped according to function:

- File Management, useful Information and Help are grouped to the left.
- The Development Process is central, and provides you with the workflow steps required for the salary packaging process.
- Supporting Documents and templates for use in the process are grouped to the right.
- Other supporting information is available through the links at the bottom.

Help

This user guide provides an illustrated introduction to *Salary Packaging Toolkit*. When you are using *Salary Packaging Toolkit* and require help in a specific area, you can refer to the context-sensitive Help file, which provides detailed information, helpful hints and links.

You can open the Help file using the buttons in the Information section of the main menu.

 For context-sensitive links to the Help file, use these information icons that you will see throughout the program.

The Development Process

To develop an effective salary package, you should adopt the 6-step methodology outlined:

- Step 1: Complete the employee details for the package
- Step 2: Select the level, and form, of the remuneration to be paid
- Step 3: Consider superannuation, payroll tax and WorkCover
- Step 4: Add benefits to the package
- Step 5: Review the package
- Step 6: Implement the package

Navigation

At each step of the development process, a set of buttons are provided to help you move from one step to another. You can use the buttons at the top of the screen, which allow you to move to any relevant step, or use the **Back** and **Proceed** buttons to move step-by-step.

In some cases, the **Proceed** button will skip one or more steps, depending upon the information you have entered. If your answers result in a step being irrelevant to the package you are working on, then the **Proceed** and other navigation buttons will not take you to the irrelevant step.

You cannot proceed to steps where you have not completed the required information in preceding steps.

The Menu Bar

Customised menu and tool bars at the top of the screen provide you with another method of navigating through the steps and reports, as well as accessing features such as file management and printing.

Frequently Asked Questions

For frequently asked questions on this product or other Thomson Reuters electronic products, please visit our website at www.thomsonreuters.com.au and select Support/Digital Support, then FAQs.

Customer Support

Thomson Reuters Helpline

Thomson Reuters Customer Care LTA ANZ will be pleased to assist you with any questions about installing or using this product. Phone **1300 304 195** Monday to Friday between 8.45 am and 5.30 pm Eastern Standard Time.