e@syFile Re-Platform

COMPLETE TRAINING SESSION FOR THE TC APPLICATION

e@syFile TC

e@syFile Replatform Version 8 Released as an upgrade to the e@syFile Flex Version:

- **Updated technology**
- **Enhanced Security Features**

OVERVIEW

1. Download and installation process.

- Installation.
- Data base information.

2. Database registration and User creation.

3. Dashboard.

4. Side menu application.

- Employer Admin.
- Employee Admin.
- Reconciliations.
- Synchronisation.
- Notification Centre.
- Third party Appointments.
- Utilities.

5. Q & A

e@syFile
PAYE
Employer

✓SARS
South African Revenue Service

e FILING

WHAT'S NEW | FORMS AND GUIDES | PAYMENTS | CONTACT SARS | TERMS AND CONDITIONS

LOGIN

Register | Forgot Password | Forgot Username | Manage Access Requests | File My ITR12 Return | Two-pot Calculator | Notice of Registration | IT Statement of Account | Directives | Correspondence | Profile Management | Book An Appointment

Welcome to the SARS eFiling Landing Page.

SARS eFiling is a free, online process for the submission of returns and declarations and other related services. This free service allows taxpayers, tax practitioners and businesses to register free of charge and submit returns and declarations, make payments and perform a number of other interactions with SARS in a secure online environment.
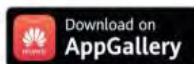
e@syFile Employer

e@syFile Dividenda Tax

⬇ Download on the App Store   ▶ GET IT ON Google Play   Download on AppGallery

Minimum System requirements

Windows 10 (64 bit)

8 GB RAM

2 GB hard drive space (for download and installation to C:/ drive; additional space will be required as employer data increases)

e@syFile™
Employer

Welcome to e@syFile™ Employer · *Software designed by*

SARS At Your Service

e@syFile™ Employer

ℹ Download the new look e@syFile™ Employer onto your desktop to import and validate declarations.

ℹ Employers already using old e@syFile™ Employer should:

- Not uninstall the old look e@syFile™ Employer application.
- Make a backup and retain the backups in a safe and secure location.
- Import the certificate history into the new look e@syFile™ Employer application

Windows Download

Important: Backup the PAYE information on your PC before installing this version as the installation may delete your current information.

⬇ Download

Other Downloads

⬇ Adobe Reader

⬇ ZipUTILITY

User Docs

Get the User Manual:

⬇ Download

Minimum System Requirements:

- Windows 10 (64 bit)
- 8 GB RAM
- 2 GB hard drive space (for download and installation to C:/ drive; additional space will be required as employer data increases)

Should you encounter an error for insecure file download please follow instruction below
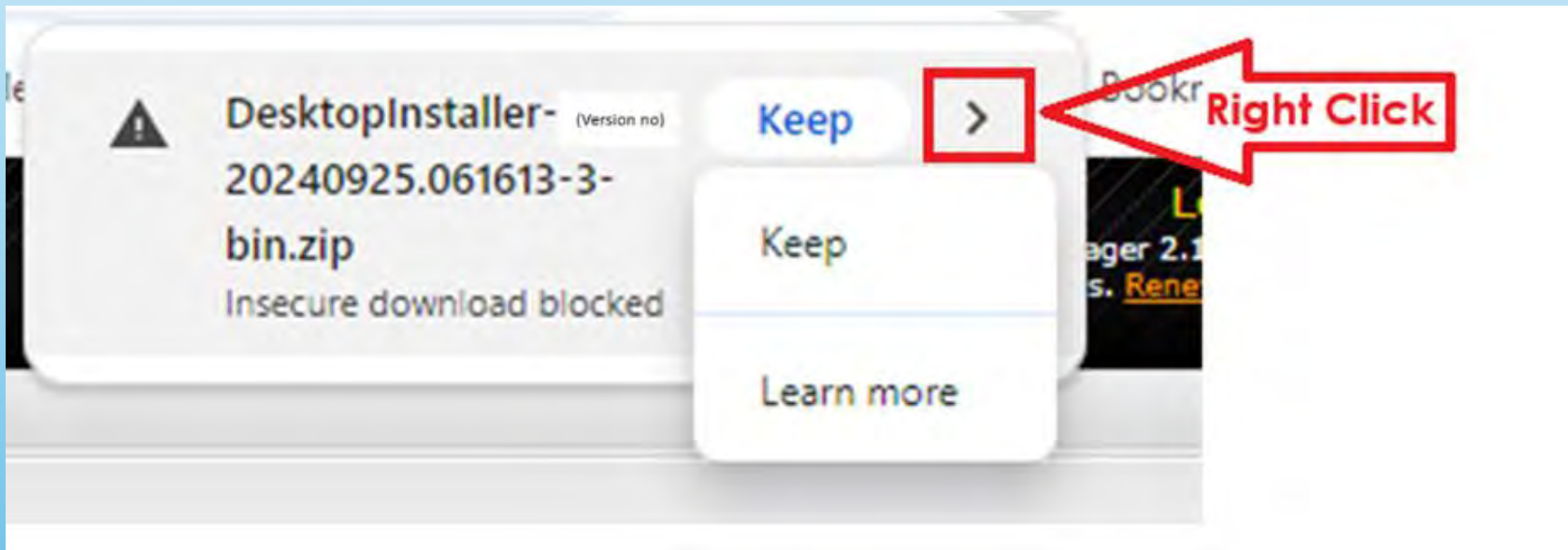
Download & Installation

Download & Installation

Download & Installation

Download & Installation

This PC > OS (C:) > EasyFileEmployer >   Search EasyFi

Sort ∨   View ∨   ...

Name	Date modified	Type	Size
App	2024/05/08 10:14	File folder	
EasyFileEmployerDB	2024/05/08 10:17	File folder	
tempFiles	2024/05/08 10:15	File folder	
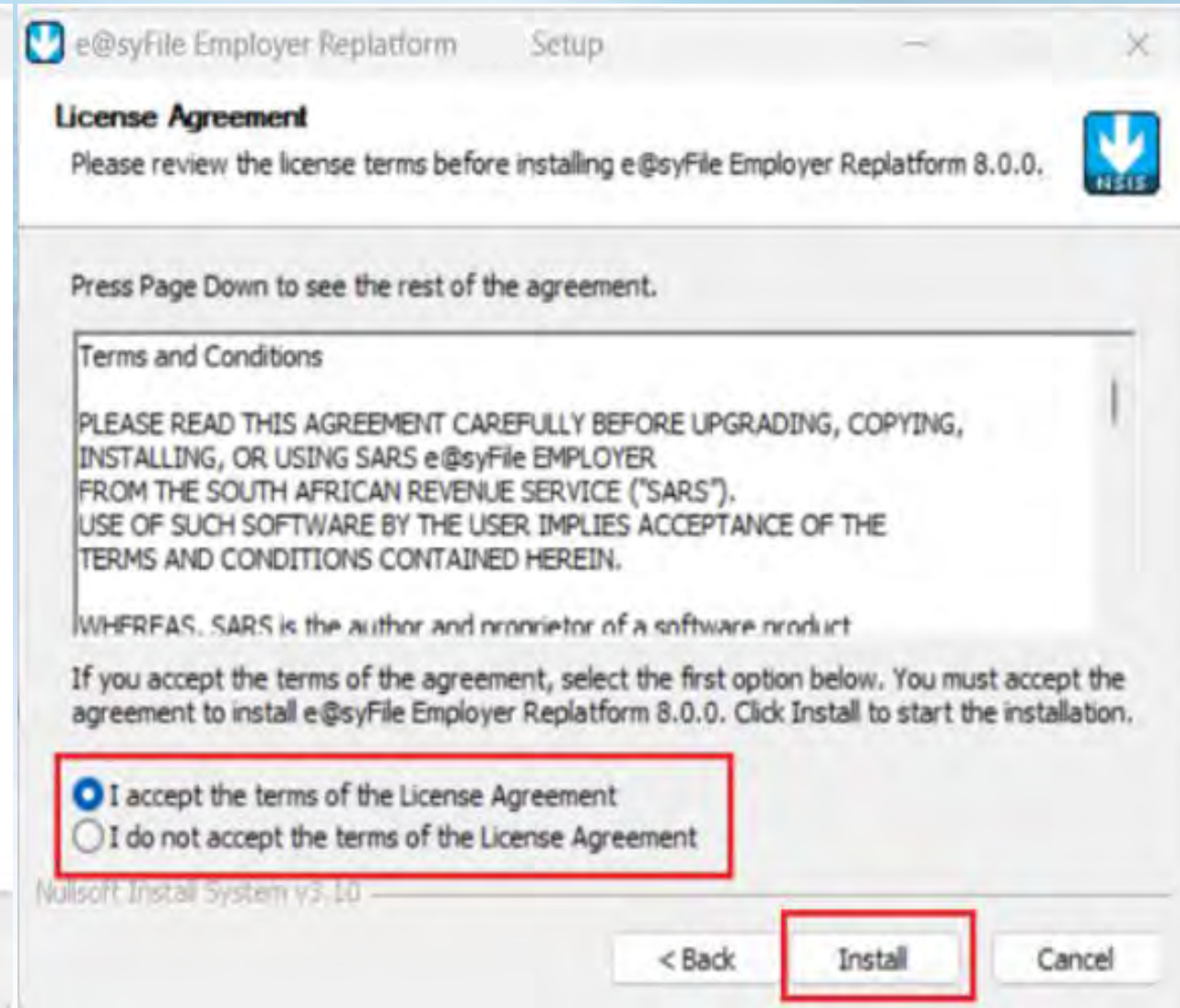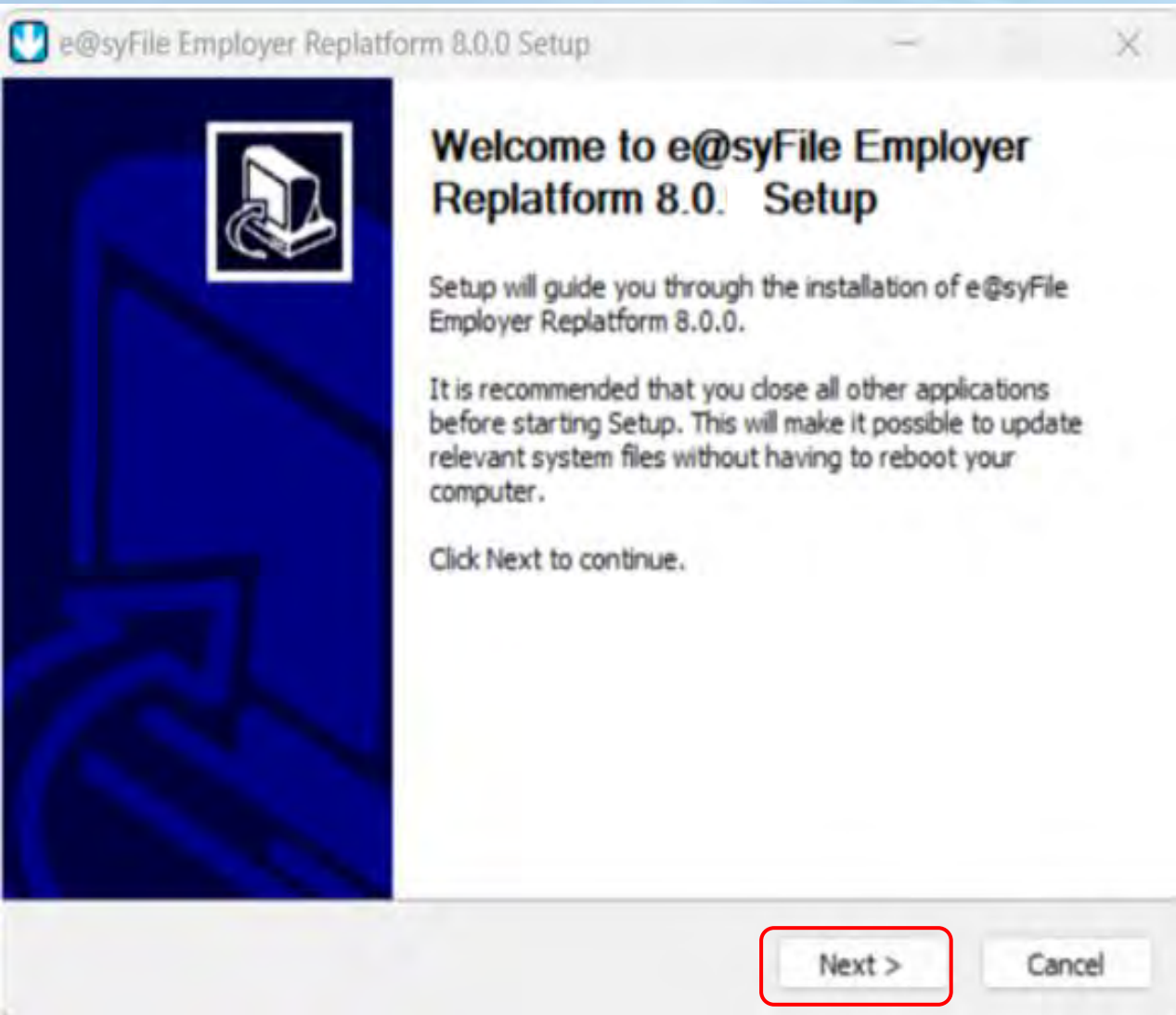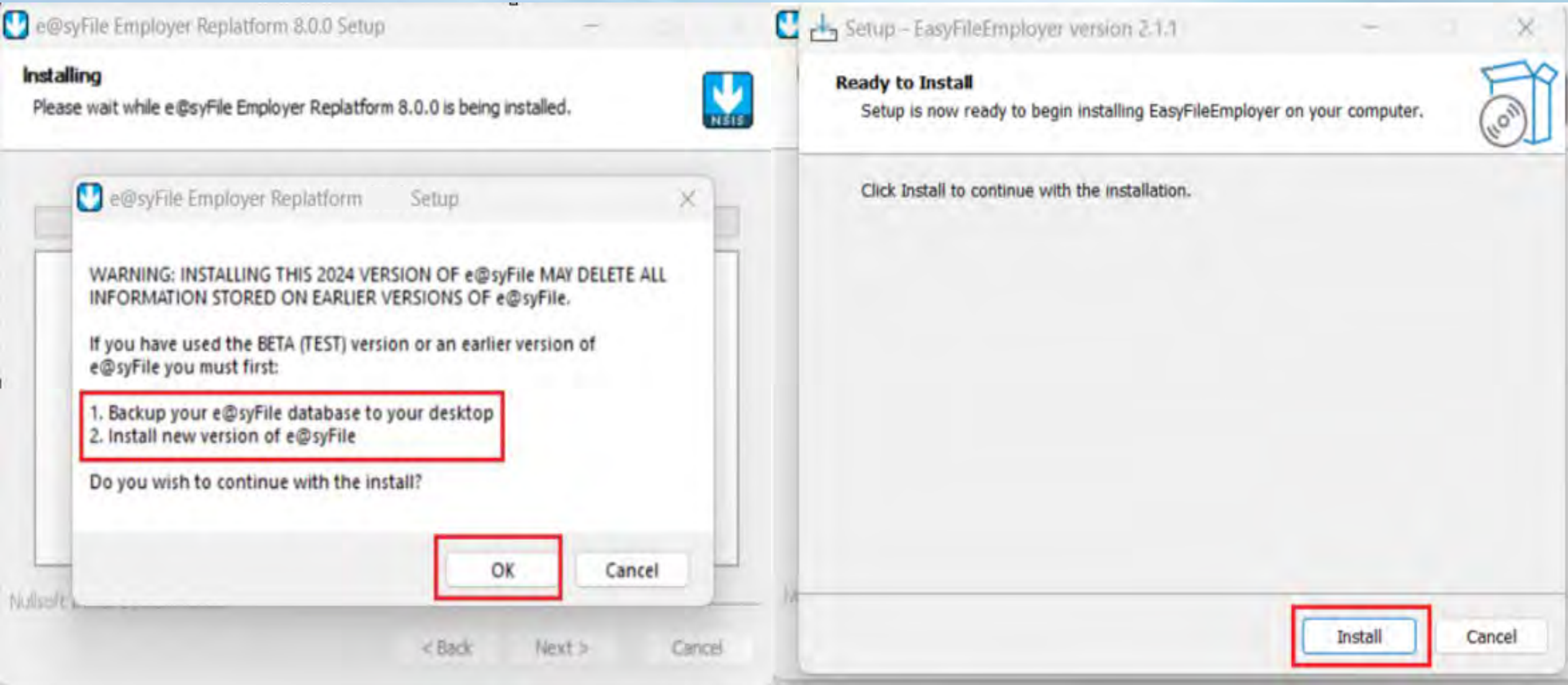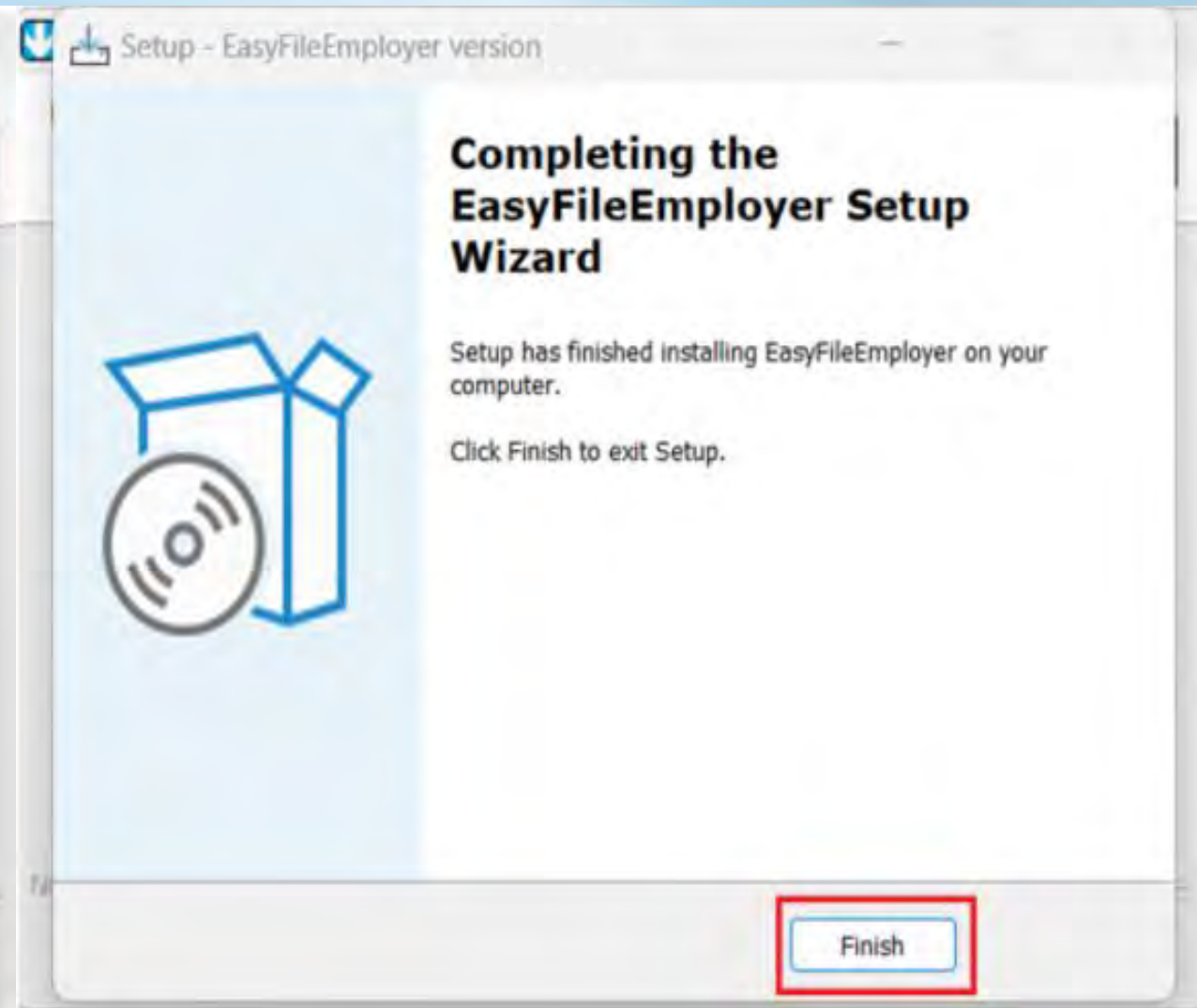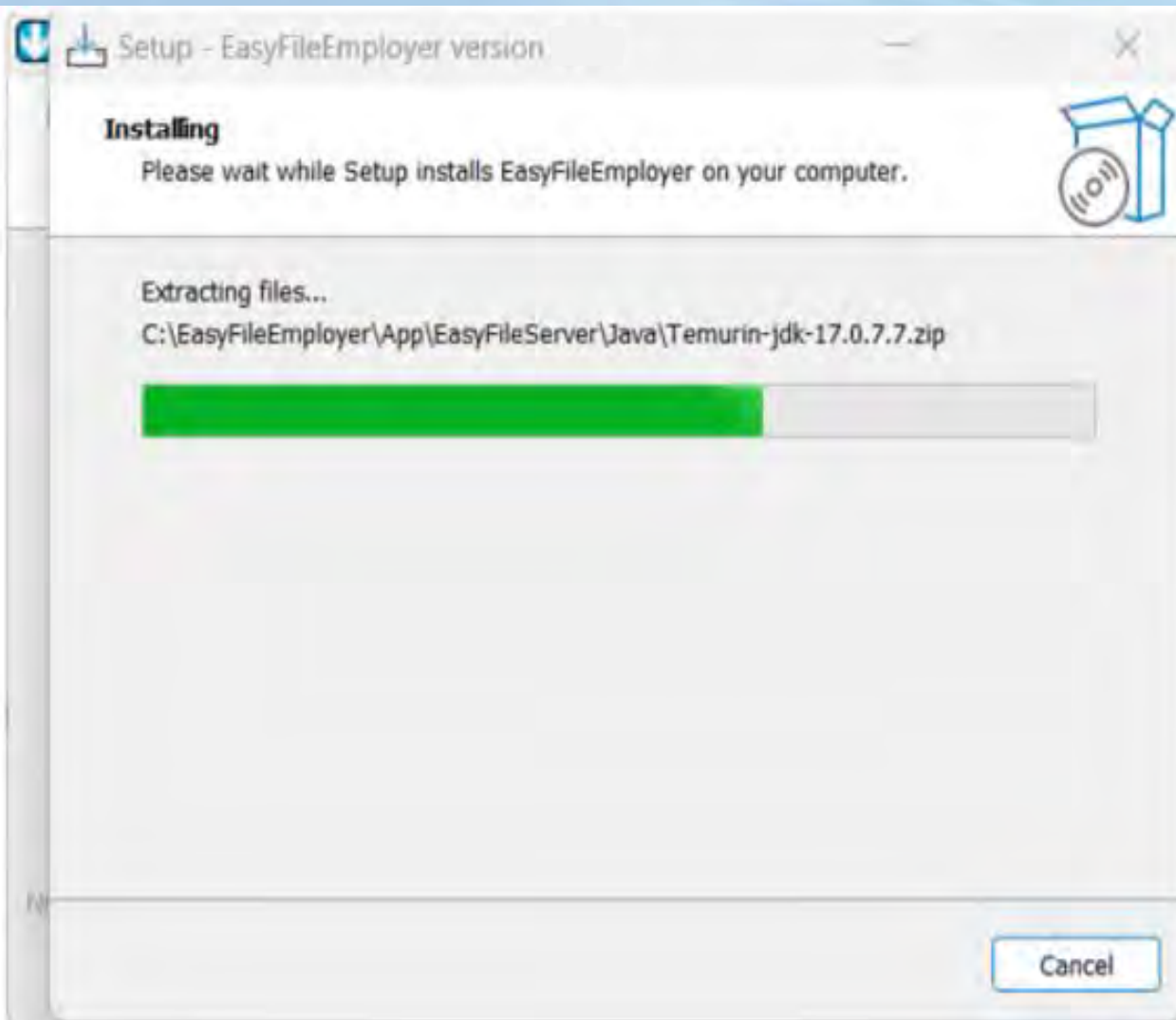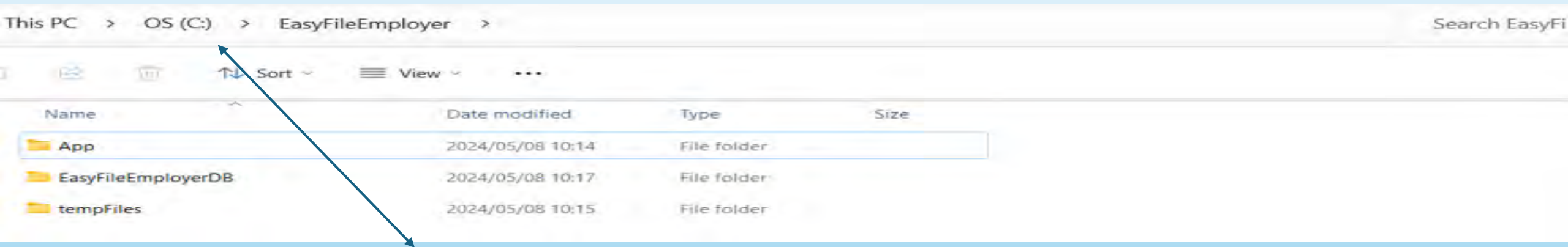
Installation file located on PC

This PC > OS (C:) > EasyFileEmployer > EasyFileEmployerDB >   Search Eas

Sort ∨   View ∨   ...

Name	Date modified	Type	Size
MainDB	2024/05/08 10:17	File folder	

New DB Created

e@syFile™
Employer

Download & Installation

Name	Date modified	Type	Size
EasyFileServer	2024/05/08 10:14	File folder	
unins000.dat	2024/05/08 10:14	DAT	378 KB
unins000.exe	2024/05/08 10:14	Application	3 149 KB

This PC > OS (C:) > EasyFileEmployer > App >   Search App

Application folder with Uninstaller option

e@syFile™
Employer

Data Base in Creation

First Screen after installation Data Base in Creation
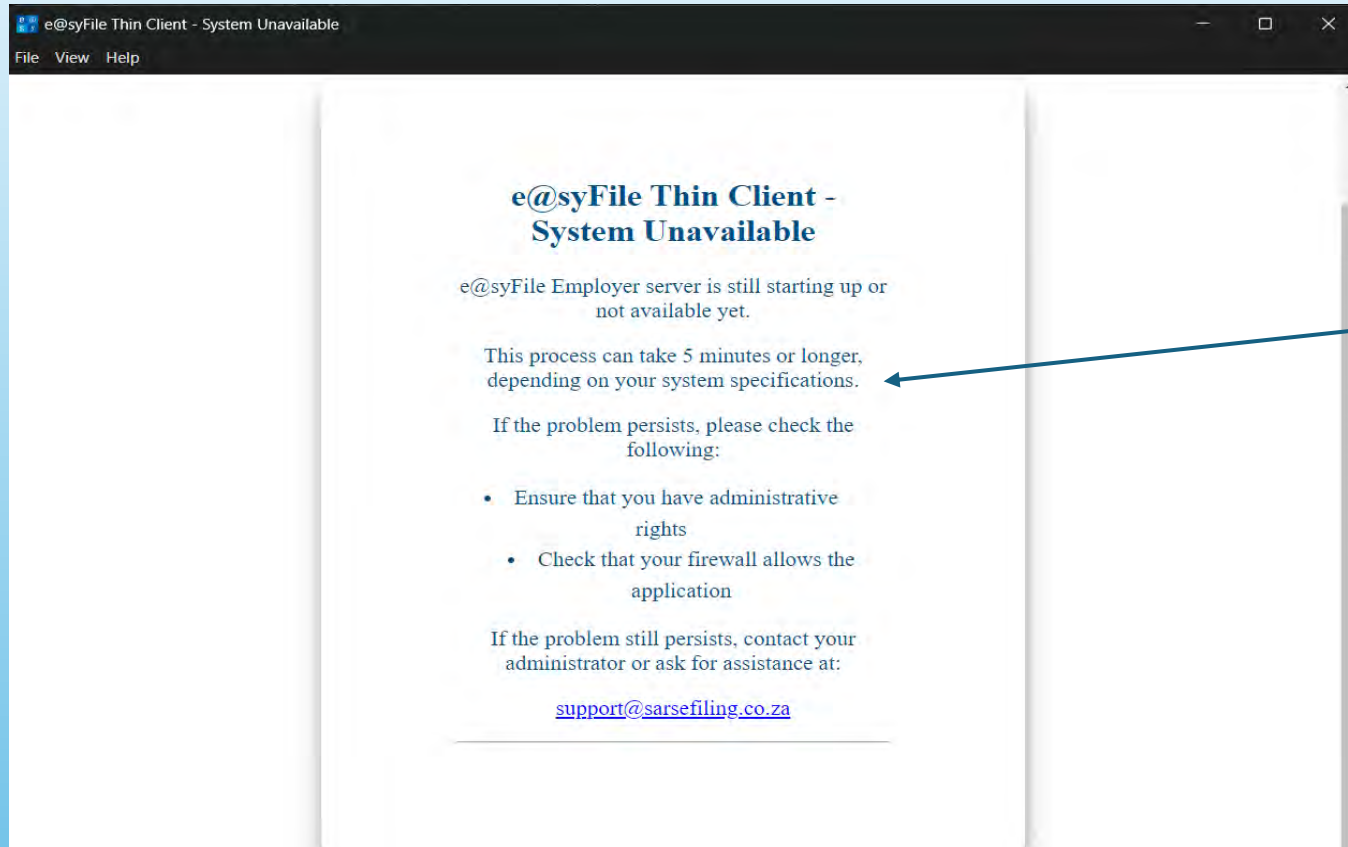
This process can take 3-5 minutes while the database is being created

EasyFileServer		EasyFileServer	Stopped
EasyFileServer	31076	EasyFileServer	Running

Task manager e@syFile server – Running Start/Stop

Systems security

Please go to the C drive and open the e@syFileEmployer folder. Select the e@syFileEmployerDB folder and see if you can open it with just a continue prompt
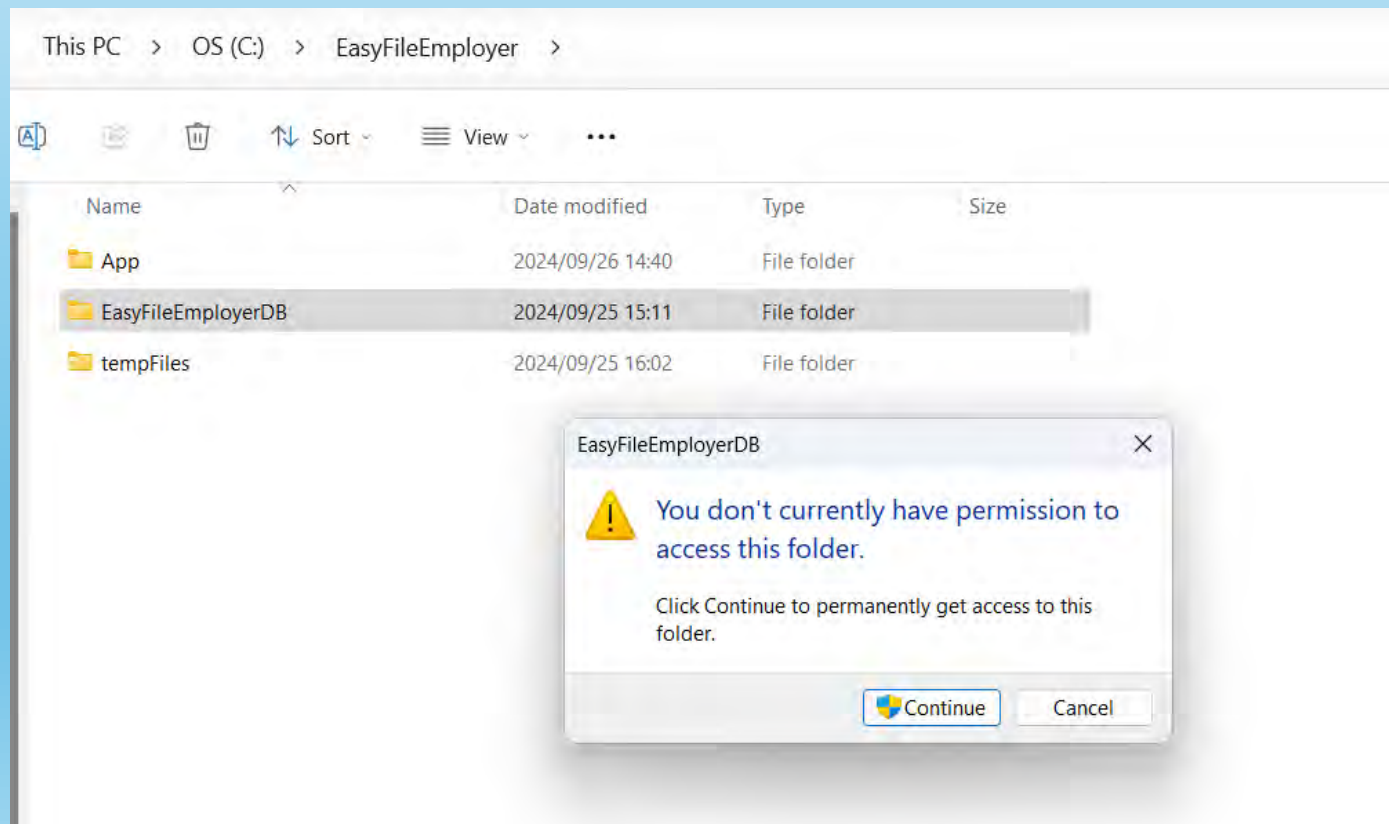
IT may need to assist, or the Tab at the bottom of the Advanced window called Enable inheritance may resolve the access issue.
Apply and close. Refresh or restart the Thin Client and try now to see if you will get the verification page.

If previous screen does not resolve the issue check the following

- **Open Notepad by searching for it in the taskbar search and then right click on it. Select Run as Administrator.**
- **Select File - Open**
- **Scroll to the C drive and select**
- **Scroll to Windows and select**
- **Scroll to System32 and select**
- **Scroll to Drivers and select**
- **Select etc**
- **Select all files to see the contents**
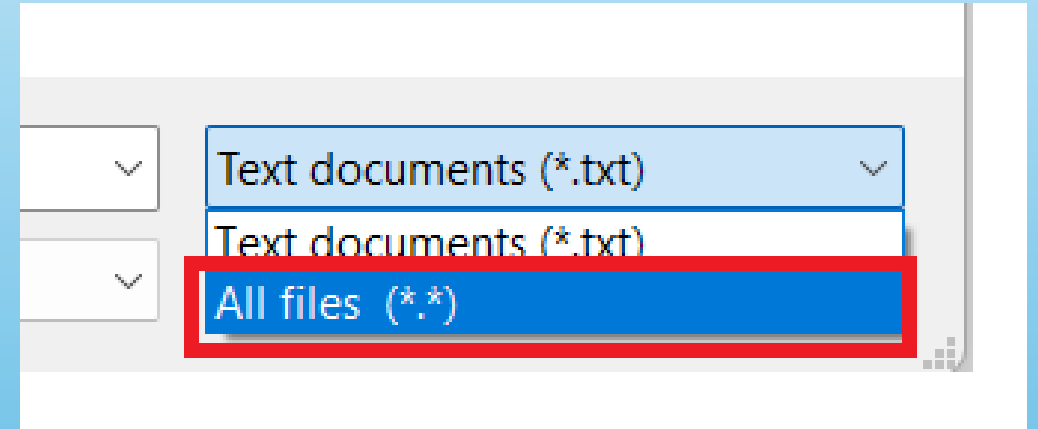
Select hosts file

Ensure that this is in its own line as you see it below.
Make sure that any line has # sign in front except the highlighted below

If the following has not been added during installation, please add it to a new line

127.0.0.1   easyfile.sars.gov.za

Example

```
# localhost name resolution is handled within DNS itself.
#       127.0.0.1       localhost
#       ::1             localhost

127.0.0.1       easyfile.sars.gov.za
```

Save and open e@syFile

DB Registration

First time use - First screen when Thin Client browser opens for a secure DB registration

- Enter PAYE ref number relevant to your eFiling profile with the user and password

- Where a PAYE registration is not applicable, the company Income Tax can be used

- Any number on your eFiling profile will suffice Multi profiles – Function is to secure the data and allow the ADMIN user to gain access should the password be lost

DB Registration
Once verified you may create the ADMIN user

Enter the password, password hint, select both boxes and click on Register

DB Registration

DB Registration

DB Registration

DB Registration

Employer Admin

First screen after logging in. Once employers have been added you will be able to select the employer you want to work on

Employer Admin

Import Payroll file

Import payroll file – Select. This will create the employer, employees and certificate information as well as the database for the period on the import file.

Import Payroll file

File selected for import

Import Payroll file

Click OK and a scroll bar will run whilst validating and a popup appears for further or next action

Import Payroll file

Import Payroll file

Go to Utilities>Validation Logs. From the dropdown select Payroll Imports. The Failed import file can be viewed or saved to open outside the application.

Import Payroll file

Import Payroll File Validation log

202302 CSV file containing ETI.txt

FAILED   Warnings

Line	Status	
7	72507681	2094 : Incorrect number of values for code (7006) expecting 12 got 6
9	72507681	WS 2098 : Incorrect number of values for code (7006) expecting 12 got 6
10	72507681	3115 : Incorrect number of values for code (7006) expecting 12 got 6
12	72507681	4002 : Incorrect number of values for code (7006) expecting 12 got 6
13	72507681	17 : Incorrect number of values for code (7006) expecting 12 got 6
14	72507681	5118 : Incorrect number of values for code (7006) expecting 12 got 6
15	72507681	5128 : Incorrect number of values for code (7006) expecting 12 got 6
16	72507681	R 5129 : Incorrect number of values for code (7006) expecting 12 got 6
17	72507681	MS 5130 : Incorrect number of values for code (7006) expecting 12 got 6

e@syFile™
Employer

Import Payroll file

Payroll File passed validation. Click OK to import the file.

Import Payroll file
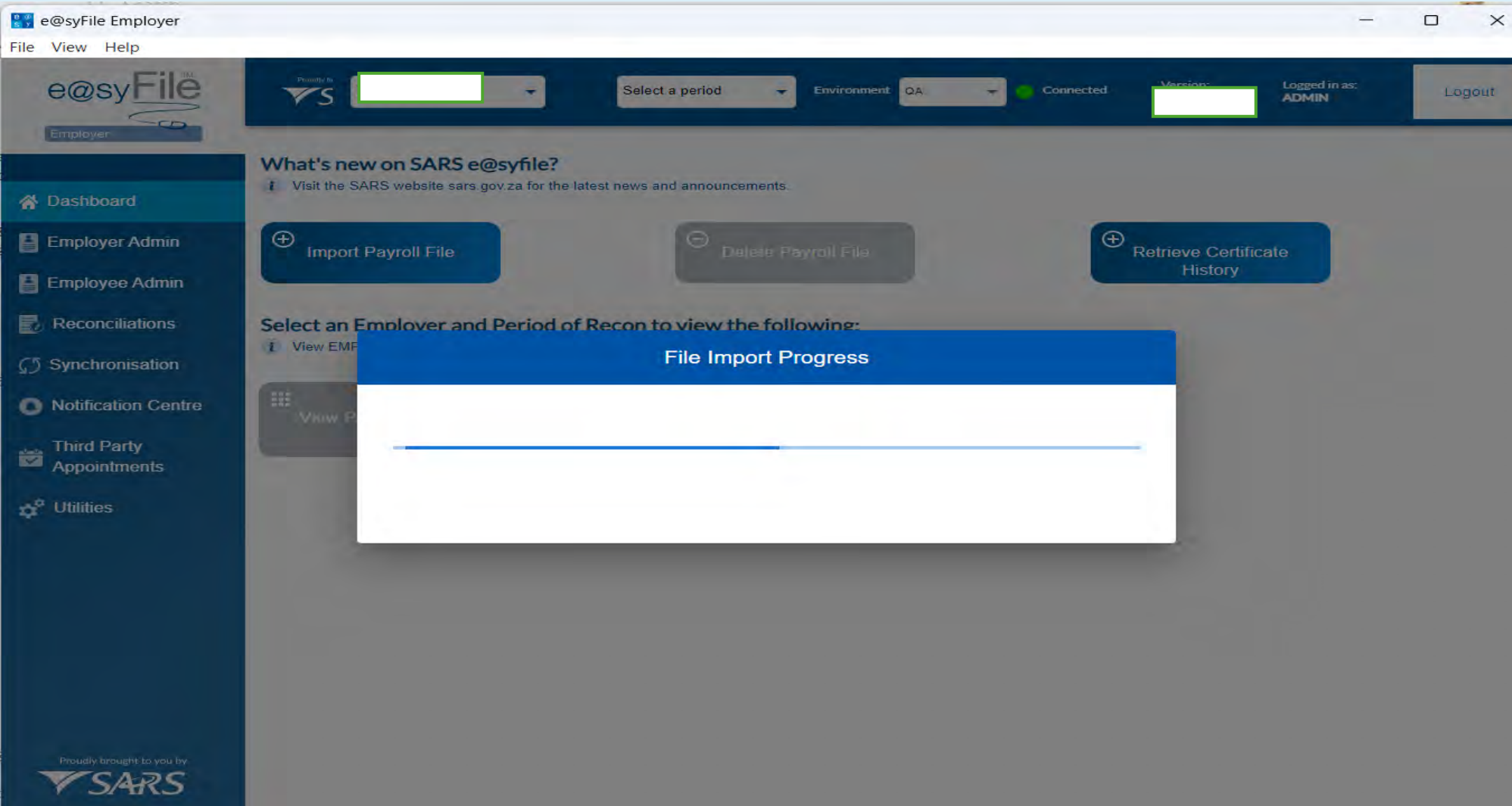
Select OK to import and the scroll bar will remain until completed. The application will not log out until complete.

Import Payroll file

Pop up once complete with options to next action. It is always advised to check the employer details and update before doing the declaration to SARS

Employer

The employer selection page when you log in or select at the top of the page will now have the imported/Created employer to select with a period of recon. Note the green tick showing the year that has active data in it. To create a recon, you will have to select the actual year you want to create and only then add the employees and certificates as the DB creates a separate DB for each period of recon.

Employer

Employer

Dashboard>Delete import file will only show a record for LIVE import file with a status of Passed-Imported.
Select the file to delete and click the Delete button. The status will indicate as Deleted in the Validation Log menu.

Employer

Retrieve certificate History – This enables you to retrieve data on a period of recon basis for the old Flex e@syFile application. You will require the old e@syFile username and password to be able to retrieve the data from the back up.

Dashboard

View PAYE dashboard tab. Account status received from SARS

Notification and Action Centre

After synchronizing, letters and correspondence will be available. Any action will be done from this page.

Request Statement of account

Option to request a Statement of account per Year

Log in with eFiling credentials

Go to Notification Centre, select company, scroll down to open correspondence

Employer Admin

Side menu - Employer Admin. To Add a new Employer or Edit an existing employer

Employee Admin

Employee admin Will only show data if the correct POR is displayed that contains data

Employee Admin

Options to Add Employee manually

Employee Admin

Reassign Certificates – ADMIN user only

Merge Employees – ADMIN user only

Employee Admin

Cancel/Revive certificate ranges ADMIN User only

Employee Admin

Search functionality in other periods and selected period

Employee Admin

Employee selection slider

Bundle Registration

Bundle registration – eFiling login details. Please ensure that TRN rights is ticked and updated on eFiling profile

Employee Admin

Duplicate Employees manually

Employee Admin

Employee Admin

Employees now copied to 2024 for certificates to be created

Employee Admin

Total employee records shown at the bottom of the view edit employee screen is for employee records and will not balance with the total certificates as some employees could have more than one certificate for the POR

Employee Admin

Note Individual IT reg button and save. The screen does not auto refresh in the TC browser so the tax number will not show until you have refreshed the page by exiting the employee and navigating back

Add Certificate

Add Certificate

Add Certificate

Enter Source Code to create a manual certificate

Add Certificate

Tax directive code will only be displayed if added under the Income Received tab first

Add Certificate

Only available if the ETI is selected in certificate Details

Directive options

Add Certificate

The value of 4118 must balance with the Monthly figures

Add Certificate

The selected certificate will default to the left and appear in blue

Add Certificate

If more than three certificates are created for an employee, select the View Employee Certificates tab for this popup to appear to select and view the certificate

Reconciliation

3 Options to select in order to prepare the reconciliation

Reconciliation

Reconciliation

Once completed, click on File to Save, Submit or download pdf

Reconciliation

Recon options available once saved

Reconciliation

Recon options available once set as Ready To File

Reconciliation

Once submitted to SARS, the Status Dashboard will be available to Update the reconciliation.
The options to resubmit(Accept Date, Reinstate ETI and Own Values) will be greyed out until updated with a SARS response.

Reconciliation

Recon accepted. Note Recon menu available again

Reconciliation

Update result popup message

Reconciliation

Once updated select the Actions tab to view options

Reconciliation

ETV report selection from drop down opens the ETV download grid. Downloaded ETV report downloaded

Reconciliation

Option the Save report to your PC

Reconciliation

Dropdown menu on Status Dashboard to generate IRP5IT3(a) PDF's. Select option and export to your PC

Reconciliation

Select OK after the file has been saved to your destination folder

Reconciliation

PAYE dashboard selected from the Dropdown in the EMP501 Reconciliation status dashboard

Period information retrieved from SARS system and displayed

Reconciliation

PDF view is not available directly from the TC browser, so you need to save the file and open it from the file. PAYE number and period opened in Adobe Reader(Preferred application)
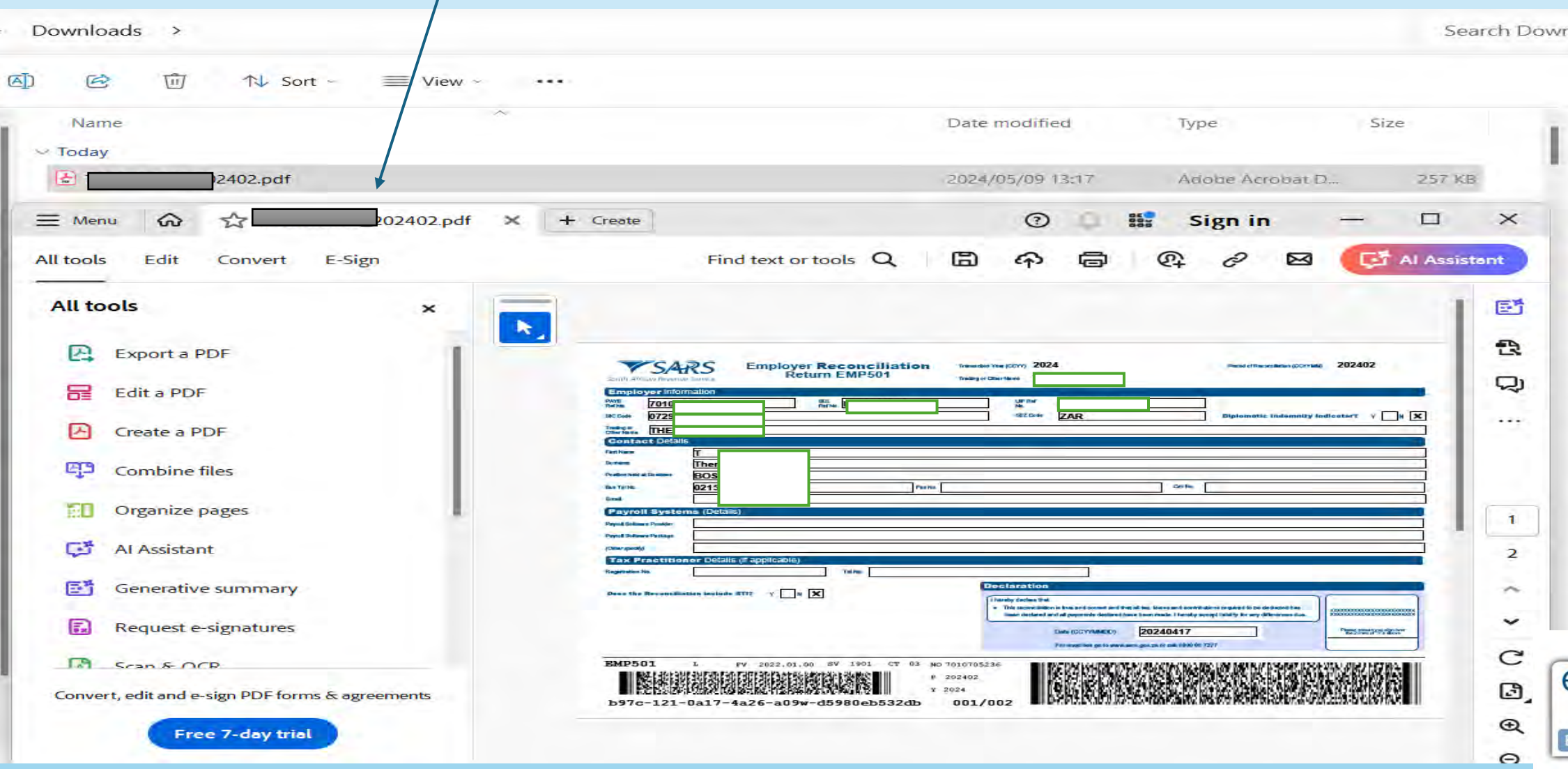
Reconciliation

Summary Report selected from the Dropdown in the EMP501 Reconciliation status dashboard. It is a Pipe delimited file format and can be opened with Notepad.

Data can only be exported if it is available on your database, it is not a request to obtain certificate data from the SARS systems if older backups or database files were lost or destroyed.

Reconciliation

EMP501 History allows a sync and open a grid at the bottom with the history.

Show history for POR even if not on current backup with option to Update the status.

Reconciliation

History can be updated by selecting the Update button

Reconciliation

Full resubmission option in the recon screen under Actions once the EMP501 has been set to Ready to file.
NOTE: Full resubmission function is not available with a Re-Instate ETI Request

Reconciliation

Disc submission option is in the Utilities menu. Note the options in the Disc submission drop down menu, Once selected it will process and give an option to save the file to your PC. The zipped file and signed EMP501 must be delivered to the requesting SARS official for manual upload.

Reconciliation

Recon page showing Disc Submission with options in drop down.

Synchronisation

Synchronisation

Sync complete. Click View Correspondence to go to the Notification Centre

Synchronisation

Notification centre – Option to sort letters, No separate Action Centre

Select employer to view letters

Audit related cases has an Audit button to action

When you select the action button for the audit case the action centre will open. Only the latest letter in the case will have an action button to access
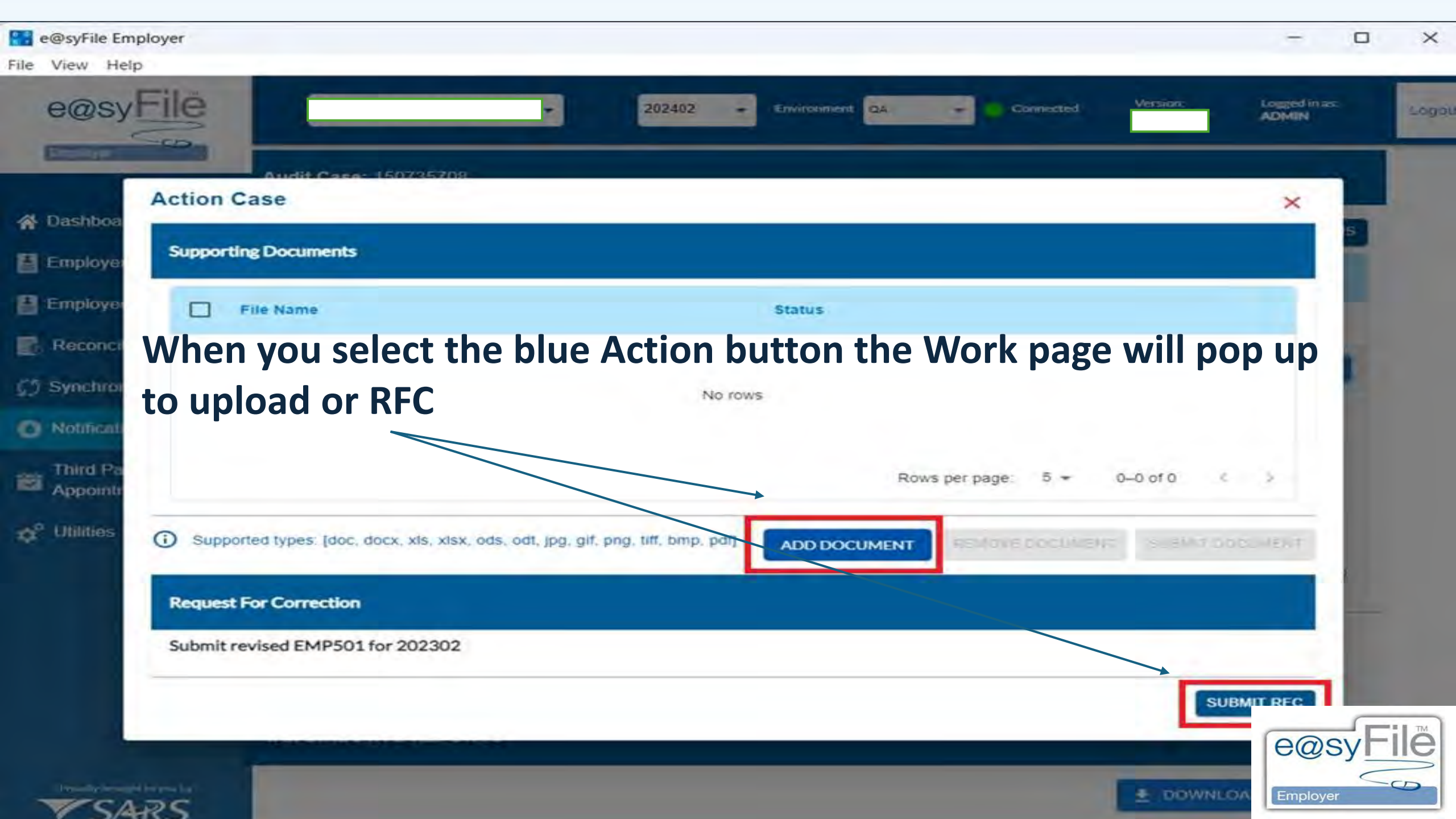
When you select the blue Action button the Work page will pop up to upload or RFC

Download function for the tax directive is available in the notification centre

Tax Directive Report

PAYE Refe...	Certificate Number		Surname	First Name		Initials	Tax Refere...	Date Of Birth	ID Number	Passport N
6	79	3 F		O	...	ONS	0	1	6	
6	79	3 M		M		MF	0	1	6	
6	79	1 H		C		CJ	0	1	3	
6	79	2 M		S		SE	0	1	5	
6	79	7 T		T		TA	0	1	6	

Total Rows: 2,783

Save Report   CLOSE

View popup for Tax directive report, must be saved to PC to open in PDF

Total Rows: 16

Database Utilities

PAYE Data Extract – Allows specific POR data from being extracted and sent to another user to import

Import PAYE Data Extract – Allows specific POR data from being imported
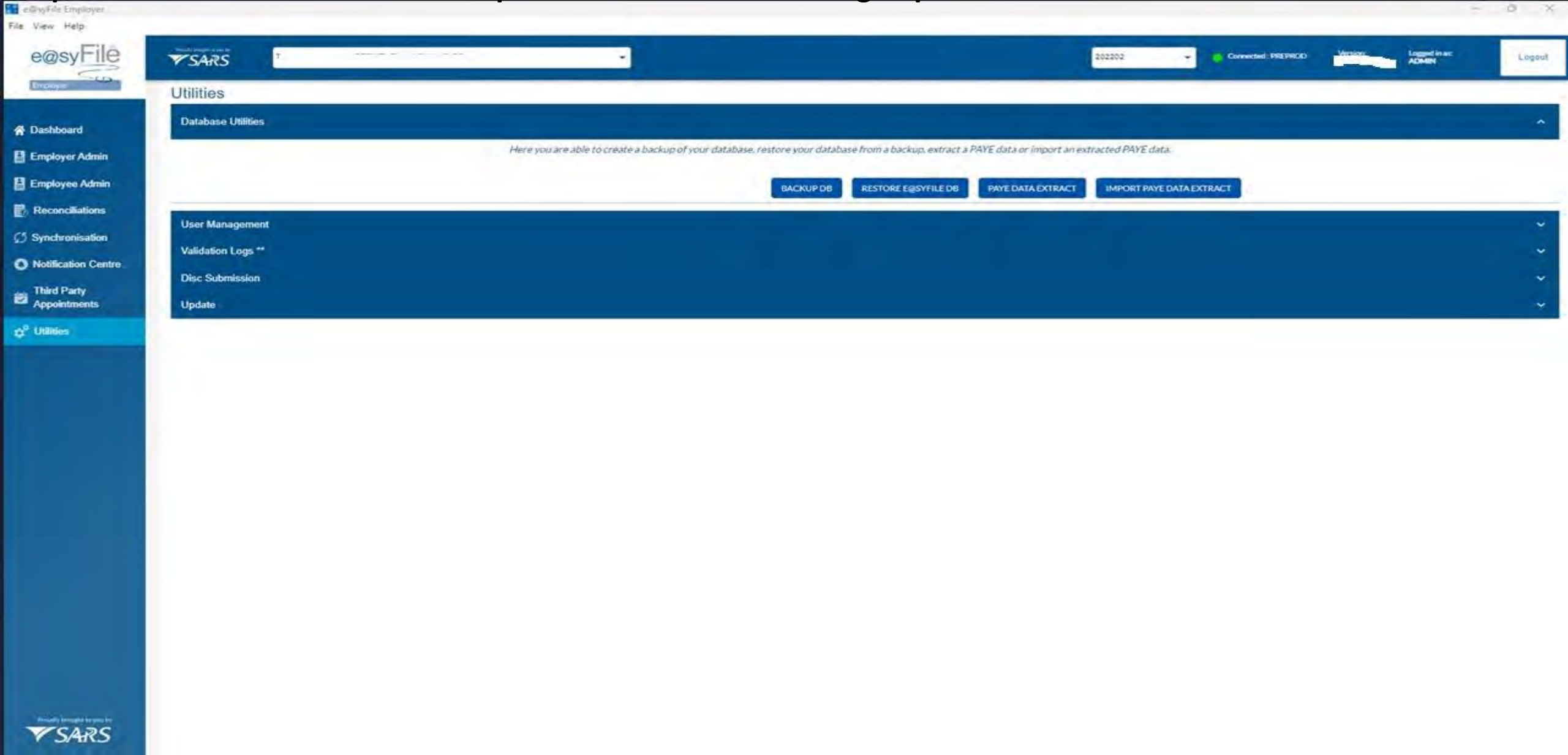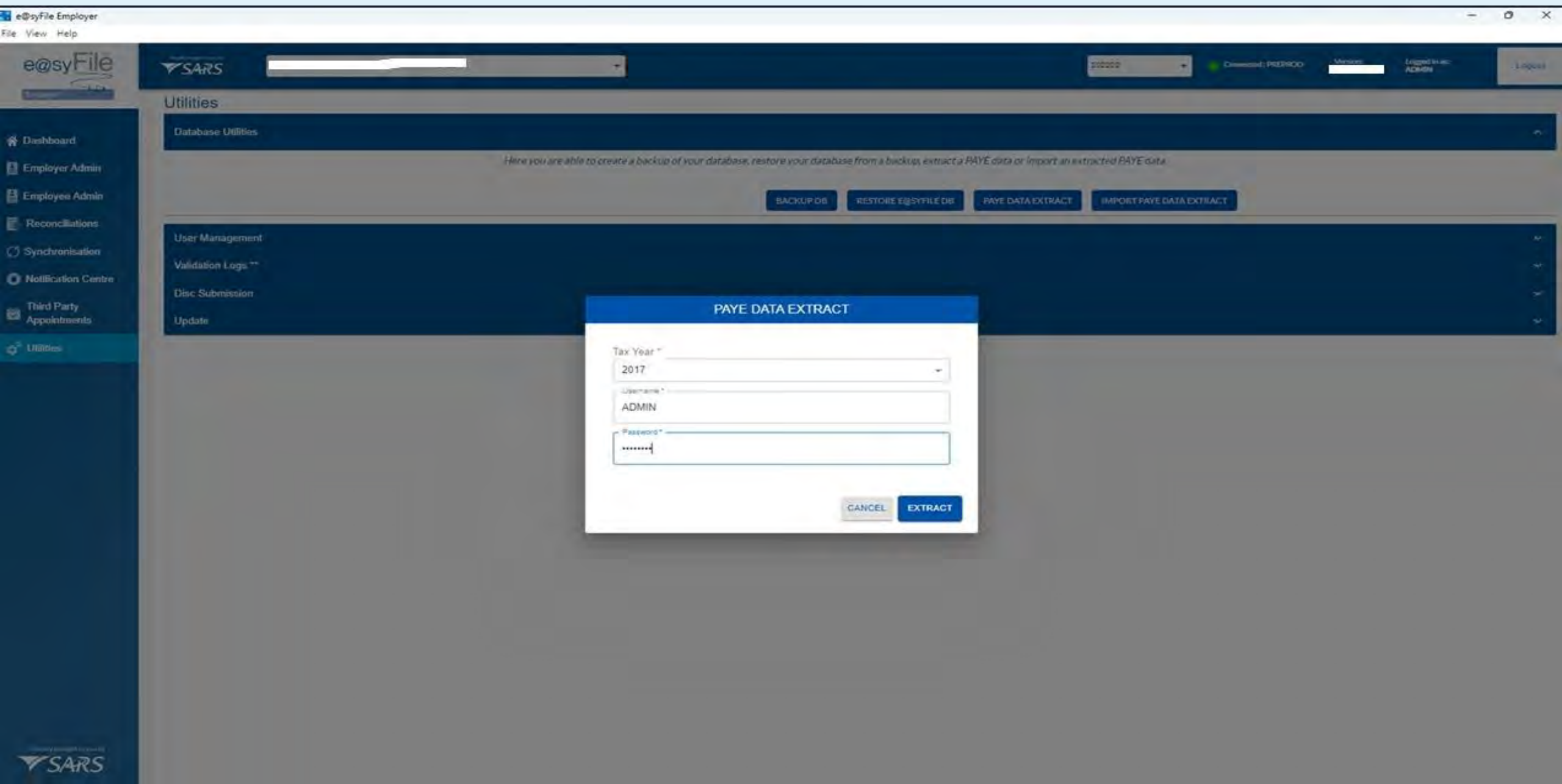
A pop-up will appear to select a destination folder where to save the extract. The file name will contain the PAYE number, e@syFile_Extract and date. This file and Username and Password for the extract can now be sent.
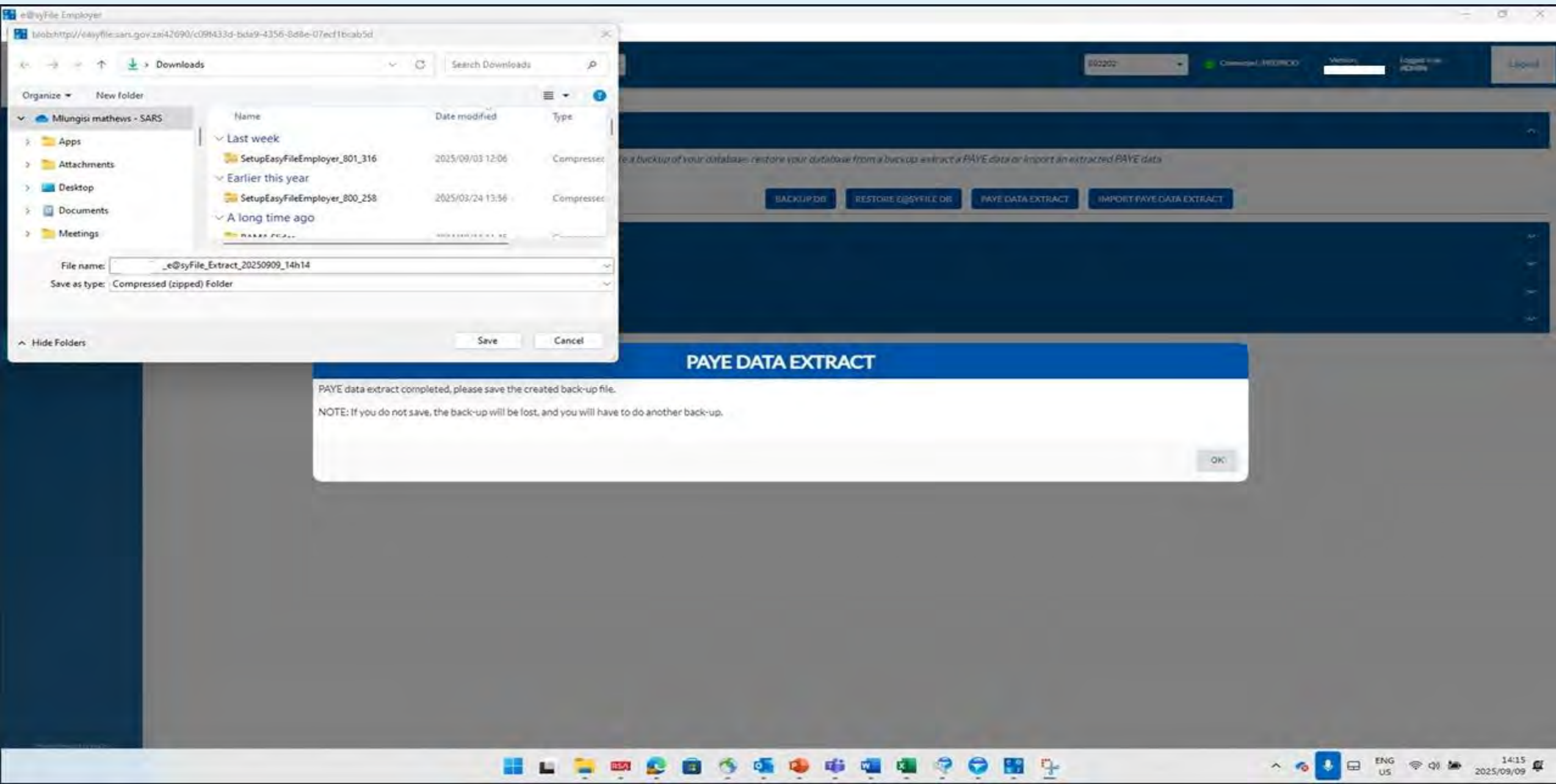
Import PAYE Data Extract – Please note the warning. Make a backup if you do not already have one. Click on Yes to import extract

Type the Username and Password received and Select File

A pop-up will appear, select the folder where the extract was saved to and click on Open
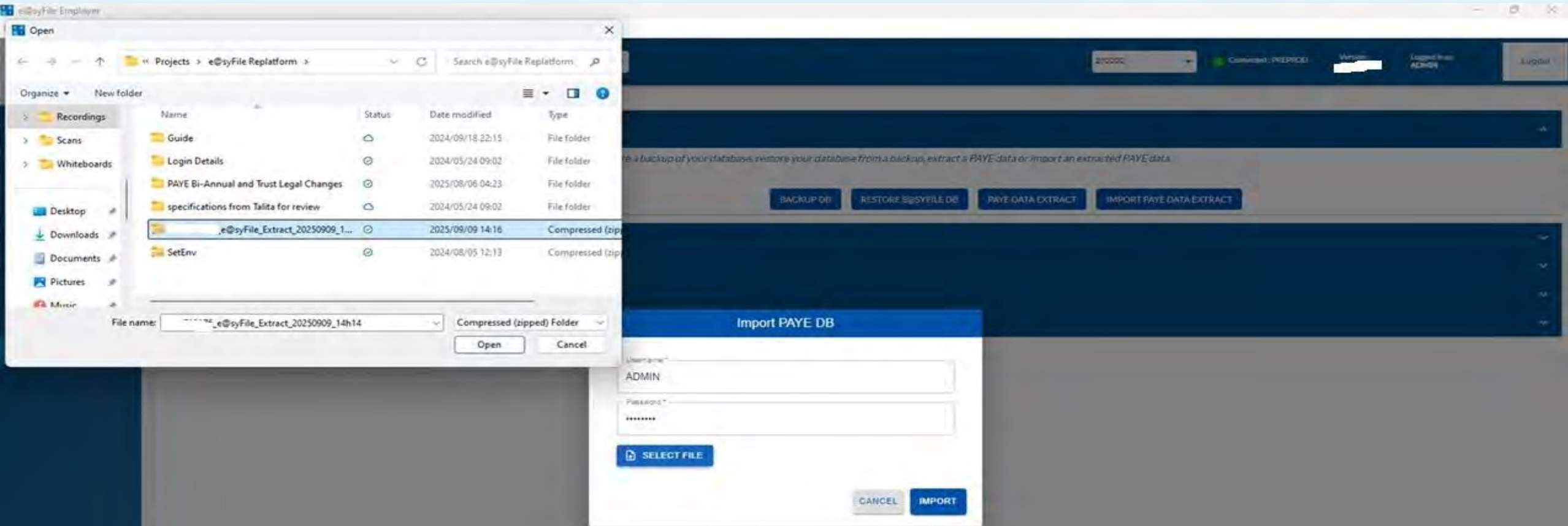
The Username, Password and selected file will display on the pop-up. Click on Import
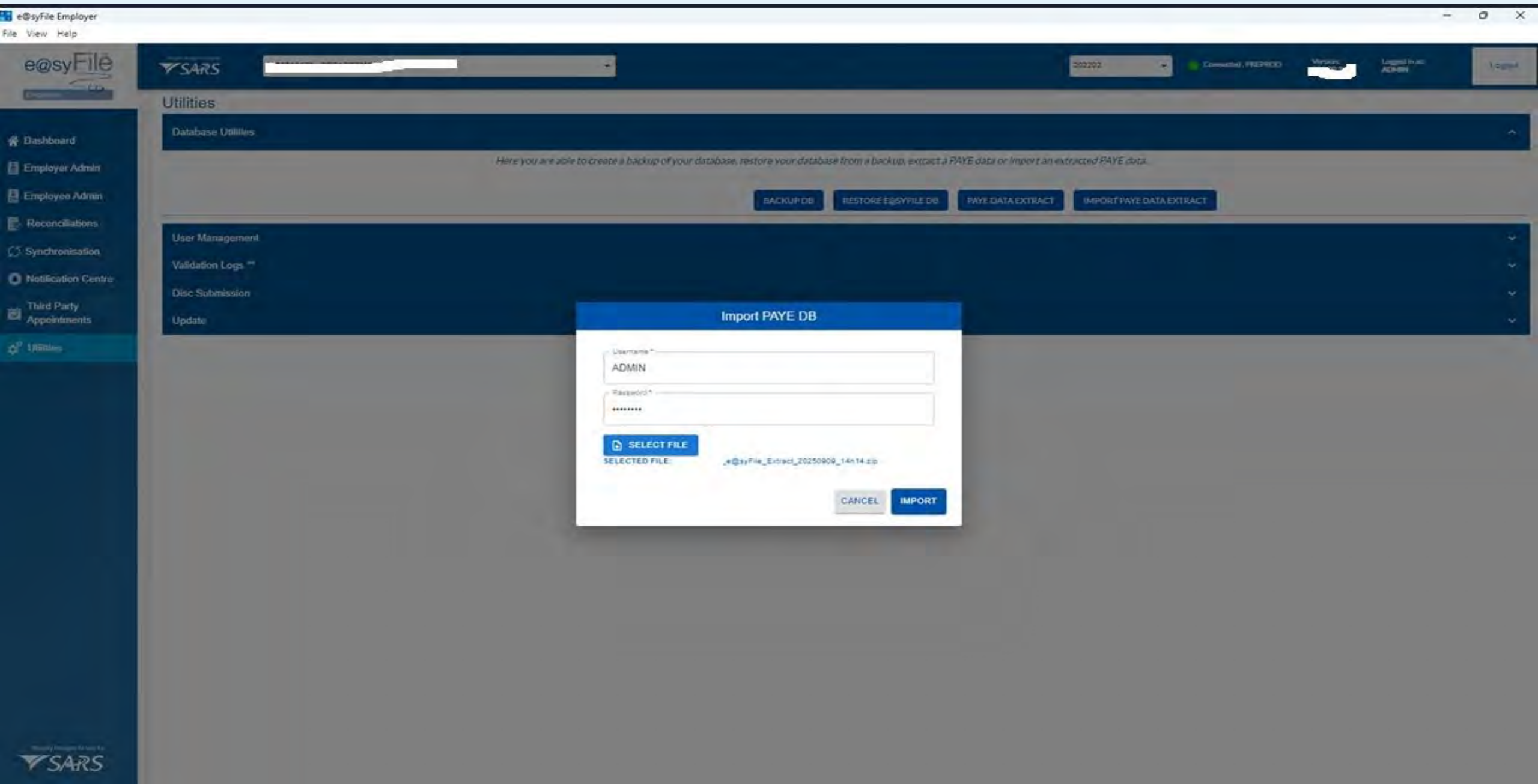
The PAYE Extract will be imported and a pop-up will appear after import.
Click Ok to log out of the application
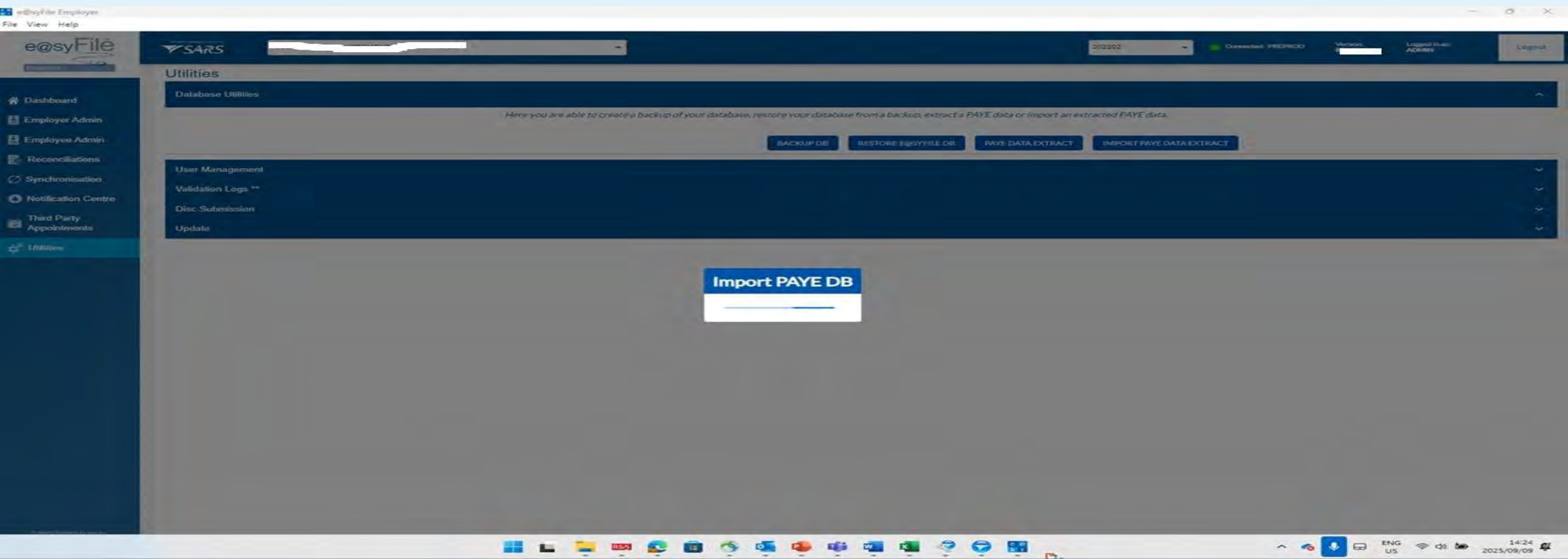
The application will close and open to the normal log in screen

Third-Party Appointments

Third Party Appointments Start page

Third-Party Appointments

Third Party Transaction and Monetary Information after selecting Find out more tab

Third-Party Appointments

AA88 Transaction Changes since previous synchronisation

Option to clear the local data previously synchronised

Third-Party Appointments

Second tab Third party Appointments/Cancellations

Selecting Search will populate all transactions. A specific search can be made using the above.

Third-Party Appointments

Full screen with options

Third-Party Appointments

Populated data after the search tab was selected with options to process

Third-Party Appointments

Export to payroll Saved to folder selected by user. Import will Request for you to select the file where it was saved to

Third-Party Appointments

Details page for individual notices – ITA88 - Assessed tax and AA88 - None Compliance

Payment reference number - AA88 indicated by a unique
reference number – Tax number, followed by "e.g." AI00000345
ITA88 Unique to the tax number, followed by T00000000

Third-Party Appointments

Bulk outcome option

Third-Party Appointments

Selected employees will be updated with status selected

Third-Party Appointments

Submit to SARS will give a summary of what has been selected

Third-Party Appointments

Important Warning Message when Continue has been selected

Third-Party Appointments

Response once submitted successfully

Third-Party Appointments

Manage payments.
Note only employees marked as Employment Confirmed and selected

Third-Party Appointments

AA88 Payment Manager. User must have selected Employment Confirmed first

Third-Party Appointments

AA88 Manage Payments

Third-Party Appointments

eFiling secure login. Must have rights to payments on profile

Third-Party Appointments

Popup for successful or unsuccessful Bulk Payment. Max upload is 500

Third-Party Appointments

Bulk Print Pop up to save to folder

Third-Party Appointments

Third Tab AA88 Recon results Options to Search, Bulk print and Export to payroll File

Utilities

Utilities menu

Utilities

Database Utilities – Backup and Restore – Extract and Import PAYE DB

User Management

User management

Function available for the ADMIN user to add users , edit details and change user Passwords

User Management

Adding a user Option to select level of the user

User Management

Option to disable a user

User Management

Option to allow editing of imported files

User Management

Click on Save and the new user will be added and displayed

User Management

User logged in only has the option to change Password

Validation Logs

All validations logs will appear on this tab from the dropdown.
AA88 Imports, Payroll Imports and Pre-Submission Validation logs

Validation Logs With view and Save to file option

Result of the successful import.

Note - Record will only show if the file shows Passed-imported

Disc Submission

Disc submission with options

Note – This option is only used if the EMP501 tax type is not activated or on request from SARS
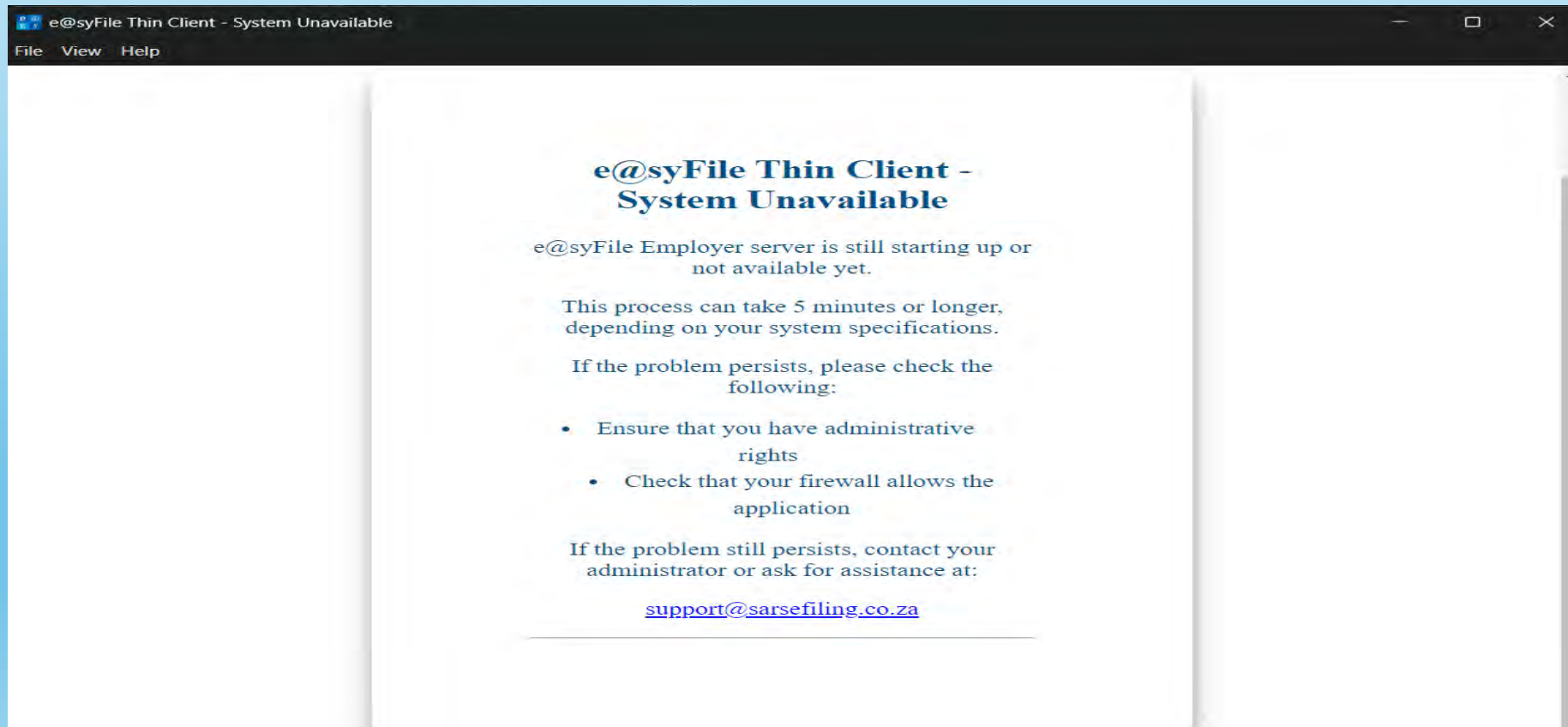
Updates

Once a full installation of e@syFile has been done, the application will automatically check if any updates are available.

Updates will be downloaded as modular updates, and only the changed modules will be updated.

Only if there are major changes will a full installation be required.

Golden Rule. If you download the latest version, you must uninstall the previous one first before installing the latest version.

e@syFile Thin Client - System Unavailable

File   View   Help

e@syFile Thin Client - System Unavailable

e@syFile Employer server is still starting up or not available yet.

This process can take 5 minutes or longer, depending on your system specifications.

If the problem persists, please check the following:

- Ensure that you have administrative rights
- Check that your firewall allows the application

If the problem still persists, contact your administrator or ask for assistance at:

support@sarsefiling.co.za

Utilities - Update

In Utilities, select Update
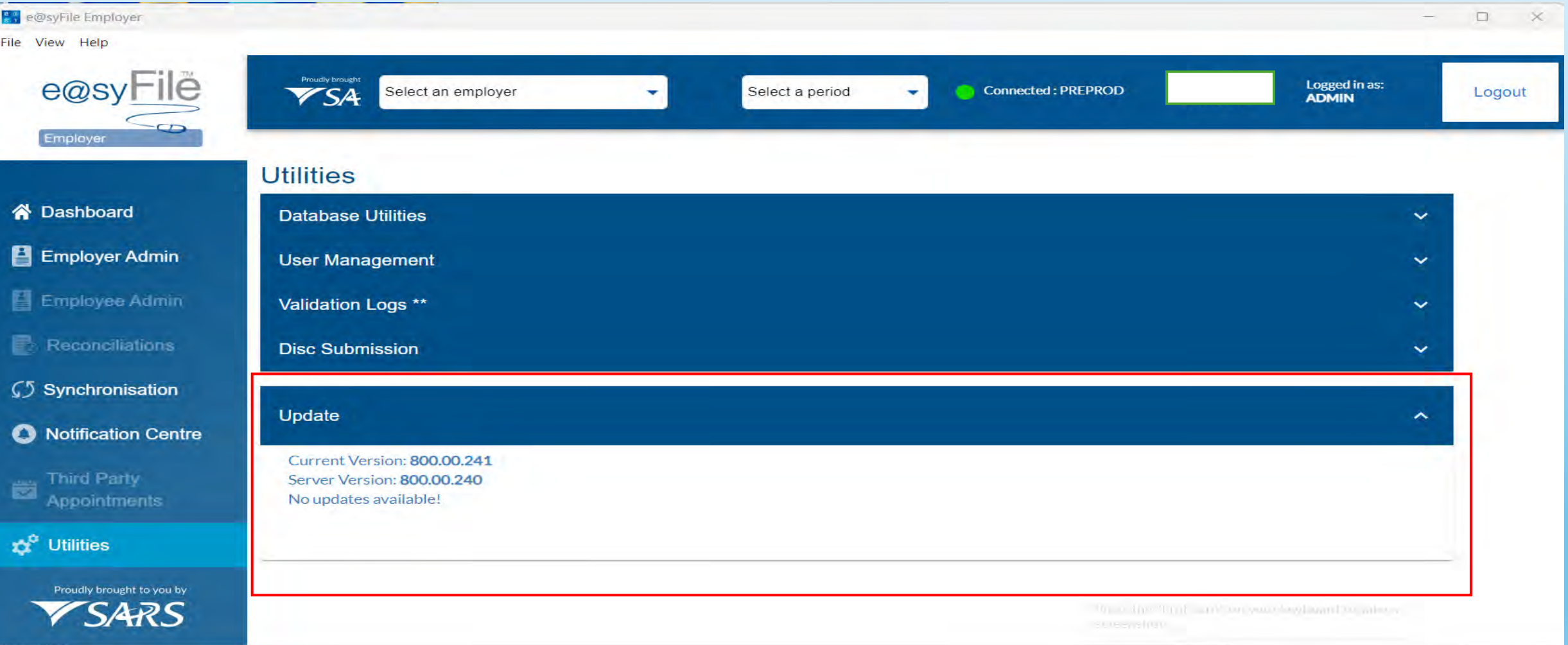
e@syFile Download Manager

If updates are available, select Update All to update the modules

e@syFile Download Manager

Once all modules have been updated, please follow the prompt from the update popup
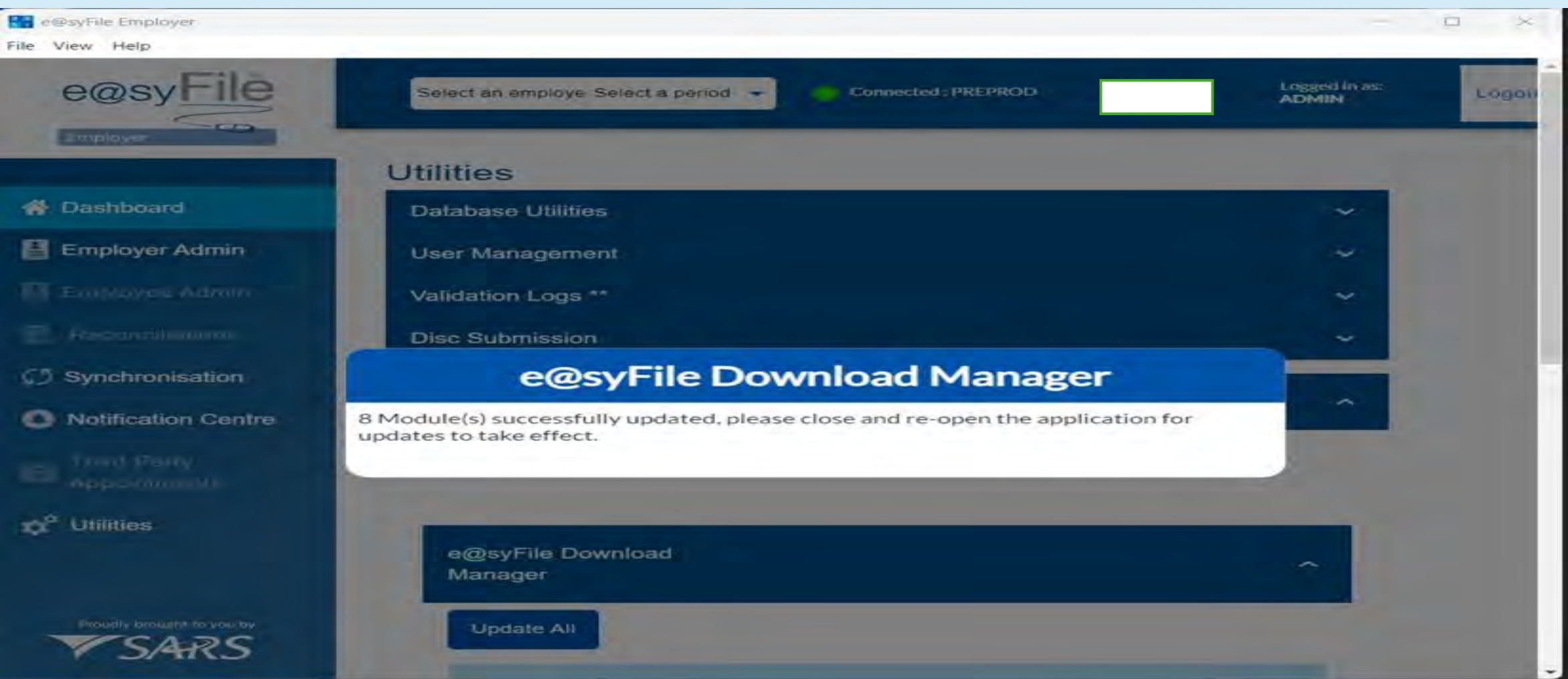
Technical e@syFile Queries & eFiling setup problems

support@sarsefiling.co.za