

# PAYROLL SOFTWARE EVALUATION CHECKLIST

This checklist has been designed for accountants and payroll professionals to ensure their payroll software:

- Meets the evolving needs of their clients
- Streamlines their internal efficiencies
- Saves time so they can focus on advisory and driving profit

## 5 ways to effectively evaluate new and existing payroll software



### TESTING IS KEY

#### New software

Test a payroll software first to ensure it's the right fit for your business before committing to it and implementing it as your chosen payroll software solution.

- Does it offer a free trial and for how long?
- Are the resources clear and comprehensive?

#### Existing software

Take note of its ability to continually meet the changing needs of your business.

- Does it have the capabilities or features to support my current requirements and meet client satisfaction?
- Do updates to the software have to be installed manually?
- Is this current software a cloud based platform?



### INTUITIVE USER EXPERIENCE

#### New software

A good payroll software should make the set up process easy to follow to ensure you're inputting accurate data for the software to process.

- Is the configuration process easy?
- Is setting up intuitive or is it confusing?

#### Existing software

How do you approach setting up a new client? If you're dreading the time it will take or anticipate yourself getting stressed by the intensity of the set up task, it might be time to make a switch.

- When setting up a new business, is it easy, or tiring and tedious?
- Is the software output worth the initial onboarding effort?



## TRUST AND QUALITY CONTROL

### New software

A good system reliably automates calculations and transactions. It should have variables in place to let you know if anything requires attention or if there is an error that needs to be rectified before pay runs are processed.

- Does it alert you if more information is needed for automation accuracy?
- Are you able to customise the automation and notification process to suit your needs?

### Existing software

If you're having to manually approve each payroll step or you experience doubt in the data produced and lack confidence in the system, then it's time to address it.

- Do you have confidence in the data produced by the system?



## INTEGRATION OPTIONS

### New software

Integration is key to adding value to your service offering. A payroll software that offers integration with multiple industry leading platforms from accounting to HR, will give you a competitive edge by being able to cater to all of your clients' needs under one roof.

- Does it have an open API?
- Does the integration transmit data seamlessly?

### Existing software

How is data transmitted between different platforms? An integration should help lessen your workload through a streamlined process instead of adding on more manual tasks to complete.

- Does the integration transmit data seamlessly?
- Do you still have to put your own time and energy into exporting and importing Excel spreadsheets?



## BENEFITS EXPERIENCED

### New software

How much time do you normally spend time processing a pay run? How does the software improve your internal processes? Recap on the overall process to determine the benefits.

- Does it save your time and how much?
- Have you saved time to take on more clients?
- Does it reduce room for error?

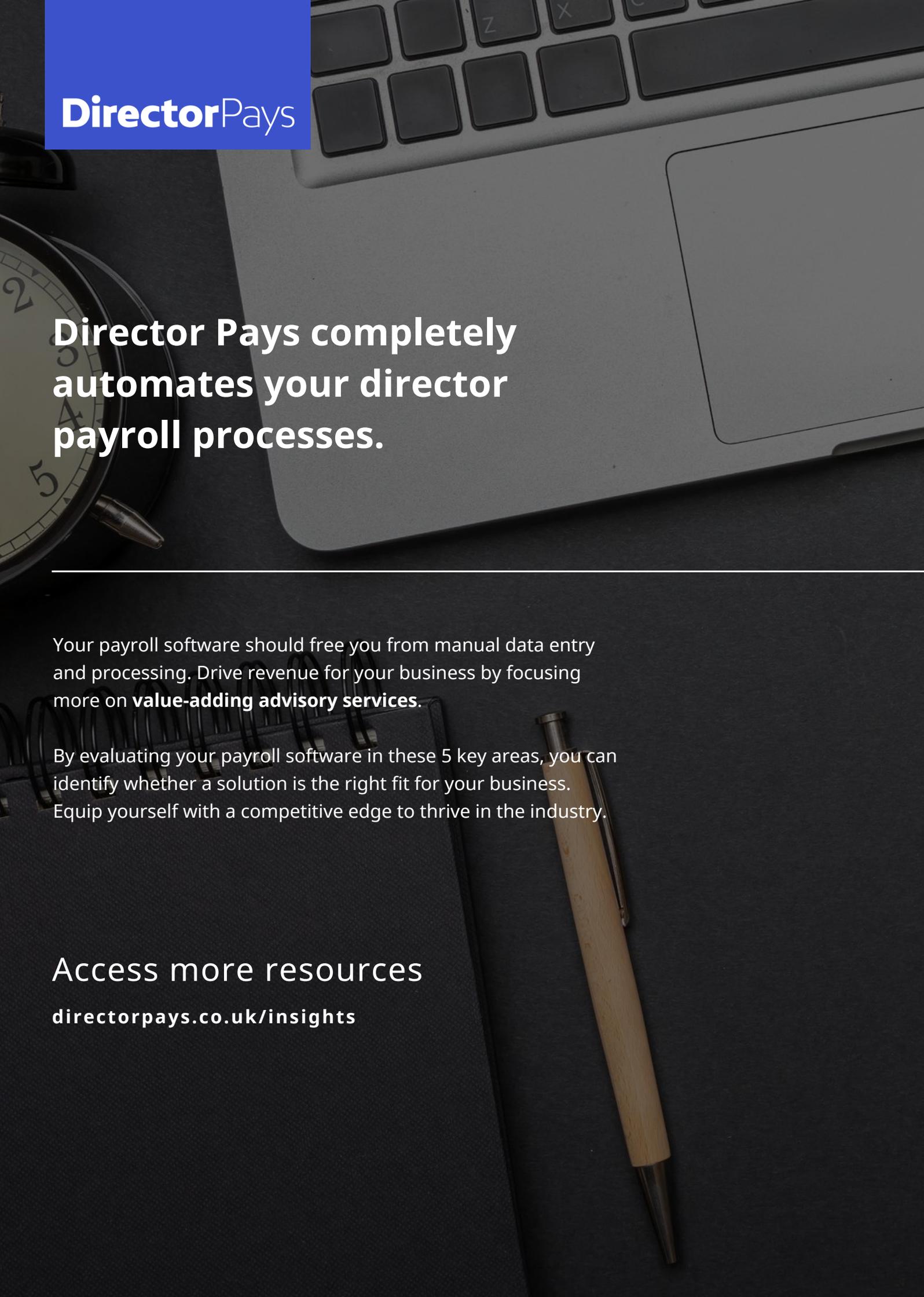
### Existing software

Measure the current benefits your existing payroll software brings against the growing needs of your business and the landscape of the industry.

- Is this platform helping you save time?
- Is this platform meeting all your current needs?
- Are you getting a high return from this payroll choice?

The logo for Director Pays, featuring the word "Director" in a bold, white, sans-serif font and "Pays" in a lighter weight of the same font, both in white text on a blue rectangular background.

**Director**Pays

The background of the advertisement is a dark, high-angle photograph of a desk. It features a silver laptop keyboard in the upper right, a round analog clock with a white face and black numbers on the left, a spiral-bound notebook with a black cover in the lower left, and a light-colored wooden pen with a silver clip in the lower right. The overall lighting is soft and focused on the objects.

**Director Pays completely automates your director payroll processes.**

---

Your payroll software should free you from manual data entry and processing. Drive revenue for your business by focusing more on **value-adding advisory services**.

By evaluating your payroll software in these 5 key areas, you can identify whether a solution is the right fit for your business. Equip yourself with a competitive edge to thrive in the industry.

**Access more resources**

**[directorpays.co.uk/insights](https://directorpays.co.uk/insights)**