Bureau Client PDF Pack (Employer Pack)

Documents · https://paiyroll.com/kb/bureau-client-pdf-pack/

Follow this guide to create a preapproval summary 2 client pack in PDF format.

Considerations

There are some differences between the XLSX version and the PDF version. The PDF version does not print wide data tables:

1. Holiday entitlements, Holiday History and Holiday Accrual
2. GB or AE (Auto-enrolment)
3. Pay Definitions.

If you need any of these sheets, we recommend you keep both report versions (XLSX and PDF), but named differently e.g. **Pre-approval summary2** in XLSX format, and a 2nd version **Client Pack** in PDF format which is more concise for sharing with clients.

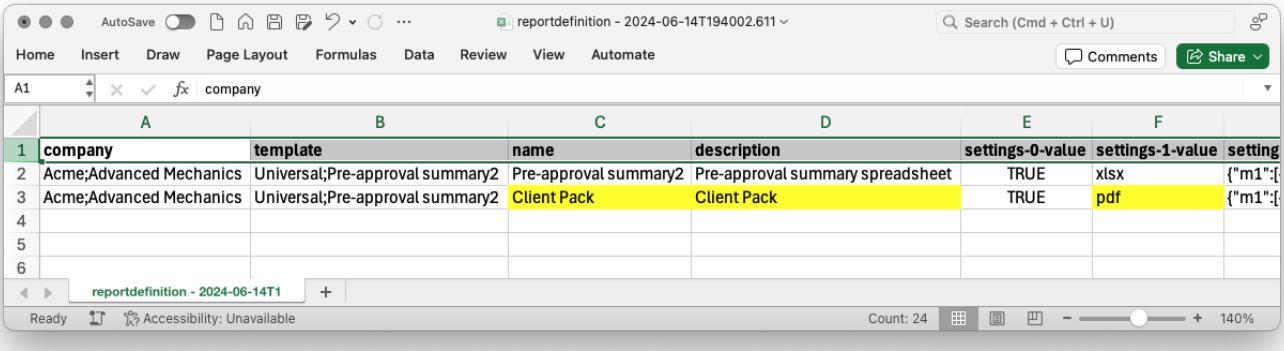
As both reports include a journal configuration, you will need to keep these aligned – so if you change one, you'll need to change the other.

Create a Client Pack PDF Report Definition

Follow these steps to either download edit and upload an existing report or create a new one.

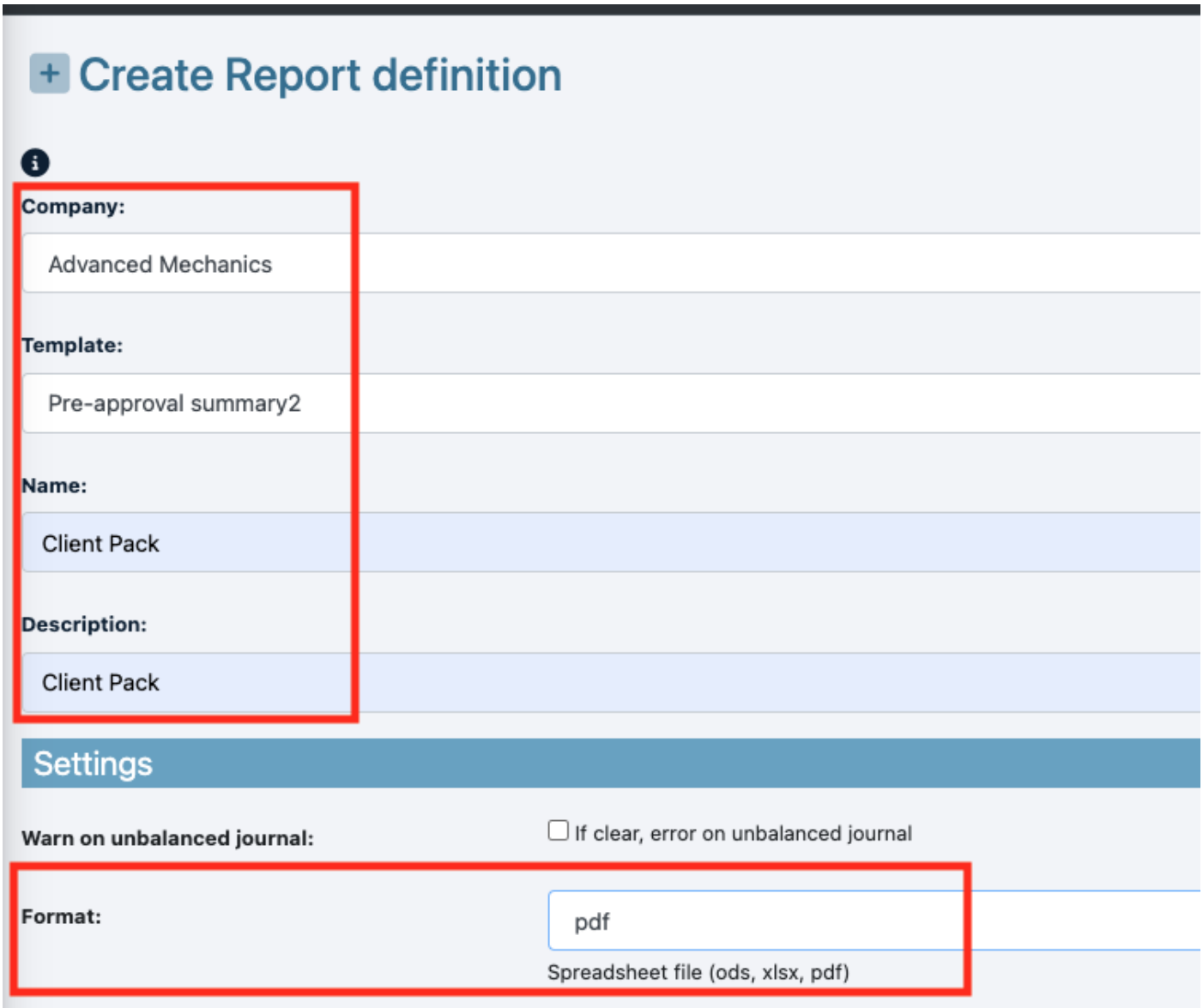
Download/Upload option

1. **Download**... all report definitions.
2. Delete all report rows except the **Pre-approval summary2**
3. Copy and paste this row onto a new row
4. Change the **name**, **description** and format to **pdf**
5. Delete the **Preapproval summary2** row as you already have that report
6. Save the file in CSV or XLSX format
7. Company Setup > Report Definitions > **Upload...** to add the new Client Pack PDF report



Create new option

Alternatively, you can create a new Report Definition in Company Setup > Report Definitions > Add



Admin My Documents

If you have setup both documents, you will have access to both 2:



Client privileged user pack PDF visiblility

See the guide on making company documents visible to privileged workers to make the client pack visible in Company Setup > Update the company > Scroll down to **Preferences**

