



# SwissSalary Direct

Date: 17.04.2023  
More information: [docs.swissalary.ch](https://docs.swissalary.ch)



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# 1 System Requirements

## 1.1 Internet Access

SwissSalary Direct is a web based application and hence requires an Internet connection. When working with the RTC Client, the NAV server (middle tier) must therefore allow outgoing connections on **port 443**. With SwissSalary 365, an Internet connection is the prerequisite for all activities and SwissSalary Direct integration. If the IT department requires so, the access can be additionally restricted to the following domain: \*.swissalarydirect.ch

Use the following link to check if the port is open and the server can be reached:

<https://api.swissalarydirect.ch/SwsDirectService.svc>

Enter this link in your Internet browser on the middle tier server or on the NAV client. If the server responds with "This is a Windows® Communication Foundation service.", the connection test was successful

← → ↻ Sicher | https://api.swissalarydirect.ch/SwsDirectService.svc

## Service

This is a Windows® Communication Foundation service.

**Metadata publishing for this service is currently disabled.**

If you have access to the service, you can enable metadata publishing by completing the following steps to modify your web or application configuration file:

1. Create the following service behavior configuration, or add the `<serviceMetadata>` element to an existing service behavior configuration:

```
<behaviors>
  <serviceBehaviors>
    <behavior name="MyServiceTypeBehaviors" >
      <serviceMetadata httpGetEnabled="true" />
    </behavior>
  </serviceBehaviors>
</behaviors>
```

2. Add the behavior configuration to the service:

```
<service name="MyNamespace.MyServiceType" behaviorConfiguration="MyServiceTypeBehaviors" >
```

Note: the service name must match the configuration name for the service implementation.

3. Add the following endpoint to your service configuration:

```
<endpoint contract="IMetadataExchange" binding="mexHttpBinding" address="mex" />
```

If you receive the message "Page unavailable", it indicates that there is no Internet connection or the port mentioned above is not open.

## 1.2 SwissSalary Plus

SwissSalary Direct requires that SwissSalary Plus must be licensed.

## 2 Settings in SwissSalary

In SwissSalary, only a few settings should be made in SwissSalary Direct and in the Employee Card.

### 2.1 SwissSalary Direct Settings

If you want to create a new account, there is the **“Create access”** function in the SwissSalary Direct settings. You will be directed to a website where the required information can be recorded.

Field name	Description / Example
Name	You enter the name of the company or the name of the client here.
Subdomain	<p>The subdomain determines the name of the web address used to register the employees. It can be freely selected. It should be noted that the employees use the subdomain in the web address, so it makes sense to use the name of the company as a subdomain. The subdomain used in the following example would be “Sample”.</p> <p><a href="https://sample.swissalarydirect.ch">https://sample.swissalarydirect.ch</a></p> <p>Please note that the subdomain cannot include spaces or special characters. The subdomain name always comes before the domain name <a href="https://swissalarydirect.ch">swissalarydirect.ch</a>: &lt;subdomain&gt;.swissalarydirect.ch</p>
Microsoft BC license	The NAV license is registered automatically.
Default price plan	You can choose from Basis, Plus and Advanced. For more information see the relevant chapters.
Tenant email	SwissSalary Direct administrator username is entered here. Optionally, use a <a href="mailto:personal@muster.ch">personal@muster.ch</a> address that can be viewed by several employees. The administrator functions are described in detail in the respective chapter.
Confirm your email	Confirm the tenant email.
Password	SwissSalary Direct administrator password is entered here. Note the minimum password requirements displayed in the pop-up window. -> After a successful login, changes can be made via User Settings. Please note that the changed password must then also be adjusted in the SwissSalary Direct settings.
Confirm password	Confirm the tenant password.
Contact Details	Please enter here the contact details of the person that created the SwissSalary Direct account and being the contact person for SwissSalary. They can be adjusted after the login under the User Settings.
Create	As soon as you click “Create”, the corresponding links will be created. Following this, the information must be recorded in the SwissSalary Direct settings as described below.

## SwissSalary Direct Setup-> General

Field name	Description / Example
Subdomain	<p>The subdomain determines the name of the web address used to register the employees. It can be freely selected. It should be noted that the employees use the subdomain in the web address, so it makes sense to use the name of the company as a subdomain. The subdomain used in the following example would be "Sample".</p> <p>https://sample.swissalarydirect.ch</p> <p>Please note that the subdomain cannot include spaces or special characters. The subdomain name always comes before the domain name swissalarydirect.ch: &lt;subdomain&gt;.swissalarydirect.ch</p>
Username	<p>SwissSalary Direct administrator username is entered here. Optionally, use a <a href="mailto:personal@muster.ch">personal@muster.ch</a> address that can be viewed by several employees. The administrator functions are described in detail in the respective chapter.</p>
Password	<p>SwissSalary Direct administrator password is entered here. Note the minimum password requirements displayed in the pop-up window.</p> <p>-&gt; After a successful login, changes can be made via User Settings. Please keep in mind that the changed password is then also adjusted in the SwissSalary Direct settings.</p>
Last sync on:	<p>The date of the last synchronization is registered here automatically. At the beginning this field is empty.</p>
Auto sync activated	<p>Regular automatic synchronization with SwissSalary Direct can be recorded with this feature. It can be helpful if you have many cases of recruitment and resignations.</p> <p>When this box is checked, a command queue items window will open. You can now select in the "Series" area the desired days the synchronization is to be carried out. Enter a start and end time and the number of minutes between each execution. For example, if you want to carry out hourly synchronization between 7:00 a.m. and 6:00 pm on weekdays.</p>
KLE Sync enabled	<p>Synchronize sickness and accident report with KLE</p>
Company key	<p>This key is generated automatically. Please never change unless a client is copied. Please note the corresponding entry.</p> <p>-&gt; view clients</p>
Client name filter	<p>The client name(s) the documents should be uploaded for can be entered here. For multiple clients, the client names can be entered with regular filter options, e.g. client1   client2   client3</p> <p>Note: This can be helpful every time e.g. a test client is created based on the productive client. The client filter prevents the documents from being uploaded from the test client.</p>
Database Name	<p>When setting up SwissSalary Direct, the database name is stored in the setup. If a copy is then made and a synchronization is triggered from this, a check of the</p>

	name from the Direct setup with the current database is performed. If the two values do not match, an error message is displayed.
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### SwissSalary Direct Setup-> Documents

Send documents to:	<p><u>All employees:</u> Documents are also uploaded for employees that have not yet registered for SwissSalary Direct. An advantage here is that as soon as an employee has registered for SwissSalary Direct, s/he will also be able to view the payslips and any other documents uploaded in the past month.</p> <p>An employee is regarded registered if s/he has successfully registered in SwissSalary Direct with his/her personal registration code and confirmed his/her email address.</p> <p><u>Only registered employees:</u> Only documents for registered employees are uploaded. This setting is recommended from the point of view of data protection. No documents are stored in a cloud if the employee does not grant express consent to this by registering.</p>
Text block for registration code	<p>The text to be placed for the employee on the payslip until s/he has registered for SwissSalary Direct is defined here, for example:</p> <p>Note: %7 is the registration code placeholder and %8 is the placeholder for the web address including the subdomain for login.</p> <p>If necessary, the text can be entered in another language by selecting this language.</p> <p>As soon as the employee has registered for SwissSalary Direct, the text is no longer displayed on the payslip.</p>
No email notification	If this box is checked, employees will receive no email notification when a document is uploaded. This can be useful for testing purposes or when uploading older documents multiple times.
Test mode	If this box is checked, you can test document upload. After the whole process finishes, no documents are stored in SwissSalary Direct and no emails are sent to employees.

Functions/ Reports	Description / Example
Connection test	<p>The connection test can be used to check if the connection to the SwissSalary Direct server can be established. If the test is successful, the following message will appear:</p> <p>“Connection test success.”</p> <p>If the connection test fails, please check system requirements first.</p>
Sync	With this feature, all employees are synchronized with the SwissSalary Direct server. If the synchronization is successful, the following message will appear:



	<p>“SwissSalary Direct synchronization completed successfully.”</p> <p>Note: Synchronization is always carried out automatically before the payslips become available on SwissSalary Direct. It is ensured this way that all employees are present on the SwissSalary Direct server.</p> <p>If the synchronization fails, please check system requirements first.</p>
Send document	<p>With this function you can provide the employee on SwissSalary Direct with documents like regulations or invitations that can be freely selected. They must be stored in a PDF format. This feature is used if the same document is to be sent to all or several employees. If person-specific documents are to be sent to individual employees, please use the Dossier Import feature.</p> <ol style="list-style-type: none"> <li>1. Use the AssistButton to select the document in your Windows Explorer / Finder.</li> <li>2. You can assign the document any file name. The employee sees this name in SwissSalary Direct. If no description is added, the file name appears in SwissSalary Direct.</li> <li>3. You determine here the time the document is available for the employee on SwissSalary Direct and the time of the email notification about a new document.</li> <li>4. You decide here if the document should only be distributed to active employees.</li> </ol> <p>Note: An employee can also access SwissSalary Direct after resignation for a specified period of time.</p> <ol style="list-style-type: none"> <li>5. Here you can set filters for personnel master data as usual as far as the document is to be made available to certain employees only.</li> </ol>
Registration code	<p>The registration codes are generated by SwissSalary automatically. They can be displayed in a list and also exported to Excel. The registration codes remain unchanged for every employee.</p>
Open SwissSalary Direct	<p>SwissSalary Direct login page (web) can be opened here.</p>
Send Dossier documents	<p>If you have filed documents in the employee dossier for the employee to see in the SwissSalary Direct, you can start sending from here. For this purpose, the "Direct" and "Visible from" columns must be filled out in the Dossier accordingly.</p>
Documents	<p>Here you can see the documents already provided for the employees. Documents already sent can also be deleted here. Deleted documents are no longer displayed for the employee on SwissSalary Direct, even if the employee has already read the document.</p>
Translation	<p>In this area, you can add a translation for each payslip, wage statement and report card.</p>
Protocol	<p>With this report you can control the documents provided, the time they were provided and who provided them.</p>

## 2.2 Settings in the Employee Card

The settings in the personnel card must only be made if it is to be checked whether the email address used by the employee to log into SwissSalary Direct should match the email address in the employee's employee card. This conformity check is an additional, though not compulsory, safety criterion. This setting can be made directly in SwissSalary Direct in the global settings.

Field name	Description / Example
Electronic Delivery	<u>Private email</u> Private email address must be entered. It is matched with the SwissSalary Direct username. <u>Company email</u> Company email address must be entered. It is matched with the SwissSalary Direct username.
Private E-Mail	The employee private E-Mail address is entered here.
Company E-Mail	The employee company E-Mail address is entered here.
Suppress SwissSalary Direct Registration Code	If this field is active, the registration code will not be displayed on the payslip. This field can also be viewed in the pay process list, edited and changed for the desired pay process.

## 3 Settings in SwissSalary Direct

The admin user entered in SwissSalary can make certain settings or see certain information in SwissSalary Direct.

### 3.1 Admin Dashboard

The Admin Dashboard provides an overview of different clients and relevant usage.

#### 3.1.1 Client Settings

You will find here one or more clients running on the same subdomain.

Field name	Description / Example
Sender email	If required, enter a customer-specific sender email. It will be displayed for the employee in his/her mail notifications. If the field is empty, an email is sent from <a href="mailto:no-reply@swissalarydirect.ch">no-reply@swissalarydirect.ch</a>
SwissSalary Version	The installed SwissSalary version
Selected price plan	You can choose the appropriate price plan: Basis, Plus or Advanced. Please bear in mind that the corresponding features (address and bank data change as well as two-factor authentication must be additionally enabled).
Company name (Microsoft Dynamics 365 BC)	The client name is displayed here. In case of changes, please immediately contact your partner or SwissSalary Support.
Bank is editable	If you use Plus or Advanced price plan, you can allow the employee to edit the bank details. As soon as the employee makes a change, you will receive the corresponding information in Smart Port.
Address is editable	If you use Plus or Advanced price plan, you can allow the employee to edit the address. As soon as the employee makes a change, you will receive the corresponding information in the Smart Port.
2 factor authentication	You can activate 2-factor authentication in the "Advanced" price plan during registration and during login. If this field is activated, the employee can activate 2-factor authentication. This is done via "User Settings", 2-Factor Authentication after logging in. Employees can save their mobile phone number as well as turn the status on and off. The phone number can be changed or deleted.
Force 2 factor	If the setting is enabled and employees log in without 2FA turned on, they will not be able to access their dashboard. Instead, a warning appears that you need to turn on 2-FA, with a link to the 2-FA settings (available in Advanced only).
Document upload	In Advanced, employees can upload documents and thus transmit them to the HR department. If the setting is activated, employees have the possibility to upload documents. The documents are fetched during the synchronization with the BC and are therefore visible in SmartPort.

Maintenance mode	Maintenance mode can be used to prevent users from accessing client-specific information. This includes, above all, the employee dashboards.
Kle	With this activation, a synchronization with SwissSalary Direct is necessary so that further setups can be made in the Admin Dashboard.
Delete Company	Here you can delete a client that is no longer required. Please note that this action cannot be undone and the client will have to be set up again, including all registrations of employees. Please contact SwissSalary Support if you have any questions.

You will get to the list of all employees (registered and unregistered) via "Employees". In "Details" you will find the following information directly synchronized with the personnel card in SwissSalary:

Field name	Description / Example
Employee No.	Employee Staff No.
Employeekey	An automatically generated key assigned globally only once.
First name	Employee's first name
Last name	Employee's last name
Old-age & survivors insurance	Social security number of the employee
Address	Employee address
ZIP Code	Employee ZIP code
City	Employee city
Phonenumber (Landline)	Employee Phone N°
Phonenumber (Mobile)	Employee Phone N°
Private E-Mail	Private E-Mail of the employee
Business E-Mail	Company E-Mail of the employee
Electronic delivery	Information which is stored on the personnel card under Electronic dispatch.
Language	Language as per Personnel card
Employment Date	Date of (re-)recruitment
Resignation Date	Possible date of resignation
Registration Code	Specifying encrypted registration code
Registration date	It is reported immediately upon the registration of an employee, even if it has not yet been confirmed.
Username	The username chosen by the employee (email)
Email confirmed	Yes: as soon as the employee completes the registration and clicks the confirmation link sent via email.

No: if the employee has registered but has not confirmed it using the verification link, the registration is not completed and the employee cannot log in. S/he has to repeat the registration process from start. Empty: No registration steps have been taken yet.
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### 3.1.1.1 SwissSalary Direct und Schadenmeldung KLE

#### SwissSalary Direct und Schadenmeldung KLE Settings in SwissSalary Direct Admin Dashboard

The setup of KLE in SwissSalary Direct is done in three steps:

1. **Requirements and settings for KLE claim reports via SwissSalary Direct**

KLE features in SwissSalary Direct are only available with version 5059.000. After SwissSalary update is complete, KLE-Synch must be activated in SwissSalary Direct settings. A synchronization with SwissSalary Direct is required afterwards so that other settings can be adjusted in the Admin Dashboard SwissSalary Direct.

2. **Settings for KLE claim recording in the Dashboard of SwissSalary Direct (Self Service-Portal)**

Another mandatory requirement is multi-factor authentication set up for SwissSalary Direct. It is only available in the Advanced version. Select the EDIT function in the Admin Dashboard, check the KLE box and the 'Force two-factor' option and save the changes. Only now the KLE functions can be viewed by employees..

3. **Synchronization without "Last synchronized on" date**

After all setups have been made in the SwissSalary and SwissSalary Direct admin dashboard, the "Last synchronized on" date must be removed in the SwissSalary Direct setup in SwissSalary and the "Synchronize" function must be performed under Process. Only now the KLE functions are visible for all employees.

#### **Enter a new incident in SwissSalary Direct Self-service Portal**

##### Recording event reports

After logging in to SwissSalary Direct Self-service Portal, an employee can enter a new accident event. Event recording is done in different stages.

Incident – Accident – Injury – Treatment – Incapacity to perform duties – Appendices

First, the incident date and the accident type (occupational or non-occupational accident, occupational disease, relapse) must be recorded. Depending on whether there is work stoppage, incapacity to perform duties can also be reported. It is followed by a description of how the accident occurred, details of the injured body parts and one or more medical contacts (doctor or hospital). If there is already a work incapacity certificate, it can be photographed and entered directly as an attachment.

As a last step, the recording and correctness must be confirmed and saved so that the new event is synchronized between SwissSalary Direct and SwissSalary.

The event report is displayed in SwissSalary for new cases and can be further processed by the payroll staff member and then submitted to the insurance company.

Erroneous reports are intercepted in the Smart Port.

#### **Display of the accident progress and adding or changing recorded or missing information in SwissSalary Direct Self-service Portal**

##### Event report progress display

Recorded event reports are sorted by the event date (see Event date). After recording and saving a new event, the status is CASE OPENED. If the event has already been reported to the insurance company by the

HR department, the status is **CASE REPORTED** and a claim number is already displayed (see the Insurance Claim column) (provided that the social security number is known/recorded).

This number can be provided to the medical contact and used to obtain medicines from a pharmacy.

Important! Event reports not yet saved are not transmitted to SwissSalary or synchronized, the last event information is only confirmed and saved.

Changing, supplementing and deleting event messages

A submitted event report can be supplemented and/or changed. It is no longer possible to delete an entire event report or individual parts in SwissSalary Direct after synchronization with SwissSalary; this can only be done in SwissSalary in KLE Case Management.

### 3.1.2 Registered employees / Usage

Here you can see a list of registered employees per client for the current quarter as well as the total number of employees of the client. The values in this table form the basis for billing. Click the number to go to the list of all registered employees.

### 3.1.3 Non-registered employees

Here you can see a list of non-registered employees per client for the current quarter as well as the total number of employees of the client. Click the number to go to the list of all non-registered employees.

### 3.1.4 Document upload status

Here is a list of the documents provided. The number of documents uploaded to SwissSalary Direct today, in the current month and in the current quarter is shown per client.

## 3.2 Global Settings

Company data was stored in SwissSalary Direct as part of SwissSalary Direct settings. This company-specific data is displayed here and can be changed if necessary:

Feldname	Beschreibung / Beispiel
Name	Company name
Subdomain	The subdomain determines the name of the web address used by the employee for registration. It makes sense to use the name of the company as a subdomain.
Microsoft Dynamics NAV license	The current license number is displayed.
Default price plan	Here you can see the version of SwissSalary Direct currently used: Basis, Plus or Advanced. Individual features are described in the relevant chapter.
Access days after resignation	You can define here how long a resigned employee may still access SwissSalary Direct. During this time, the employee is considered registered and will be taken into account for billing purposes
Notifications for not registered employees	If the box is checked, non-registered employees will also receive notification emails about new documents made available in SwissSalary Direct.

Employee email verification	<p>If the box is checked, SwissSalary Direct username is compared with the corresponding employee's email address in SwissSalary. If they do not match, the employee cannot register in SwissSalary.</p> <p>Note: This conformity check is an additional safety criterion, and can be disabled. It is carried out once during the registration of the employee.</p>
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### Contact Details

Contact details stored during the provision of access are displayed here. They are used for SwissSalary in the event of any contact. The information can be changed here at any time.

## 3.3 User Settings

Using User Settings, you can

Change password	Here you can change the password after login. If the password is no longer known, you can use the "Forgot my password" feature on the home page.
Change username	The username corresponds to the mail address at registration. If necessary, it can be changed via this function. Mail will not be checked here. The notifications will also be sent to employees at this address.
Change profile photo	If desired, a profile picture can be uploaded or deleted here.
Enter registration code	The employee only needs the registration code when registering for the first time, unless client is changed. This process is described in the relevant chapter.
Two-factor authentication	If the Advanced price plan is activated, 2-factor authentication can be managed here.

User settings are also available to every registered employee and their personal data can be changed here.

## 3.4 Versions

SwissSalary Direct is available in three versions.

### Basis

Employees are provided with paycheck, salary certificate, report cards and other documents in electronic form. Employees have no communication options, they contact the HR department directly if they have concerns.

### Plus

In addition to the "Basis" features, employees have the option to make changes to the address and to the bank account in SwissSalary Direct. The administrator must activate this feature for the respective client in advance via "Edit" in the Admin Dashboard. The changes made by the employee are then displayed in SmartSport in SwissSalary and can be transferred directly to the Employee card.

### Advanced

Advanced offers more features in addition to the Basis and Plus features.

In the Advanced version, employees can upload documents and send them to the HR department.

Furthermore, a two-factor authentication is offered. Employees have the option to verify access via SMS code by entering their mobile number every time they log in. Employees have the option to activate two-factor authentication, it is not obligatory though. Only Swiss mobile numbers are allowed, it is prohibited to input foreign mobile numbers.

Two-factor authentication is activated by the admin user per client directly in SwissSalary Direct settings. This is done by selecting the Advanced price plan and by checking the “2-Factor Authentication” box. This way all users of this client can see two-factor authentication in user settings. If a user is affiliated with several clients, two-factor authentication becomes visible as soon as one of the clients activates this feature.

Employees enter their own mobile number in the specified format; if they make a mistake, an error message is displayed. After the mobile number has been entered correctly, a verification SMS will be sent and the confirmation code can be entered in the form. Registered mobile number is also changed this way. Two-factor authentication now has to be turned on via the green “Turn on” button. The status is changed to “On”.

It is impossible to log in without a code if two-factor authentication is enabled. After clicking the button, the code is sent and can be entered in the code input screen.

#### Cost

The costs are calculated per registered employee a month.

SwissSalary Direct Basis	CHF 0.50
SwissSalary Direct Plus	CHF 0.75
SwissSalary Direct Advanced	CHF 1.00

Invoices are issued quarterly. In each case, the number of employees registered for SwissSalary Direct is determined based on their employment. Employees that have resigned and still have access to their SwissSalary Direct account under the access rules are also taken into consideration.

The version can be changed at any time.

### 3.5 i / Languages

Here you can find information about

Help with registration	You will be automatically taken to a video that will help with the registration. By searching YouTube you will find the video in several languages.
Security information	You can see the latest security and privacy information here.
DE   EN   FR   IT   ES   PT	By clicking the respective language, the current page is displayed in the selected language.

### 3.6 Log off

After clicking Log off, you will log out and will be automatically redirected to the login page.



## 4 Sending documents

### 4.1 Paycheck

To send payslips to SwissSalary Direct, a wage must be accounted for, non-posted or posted. We recommend putting online only non-posted or posted pay processes.

Open the corresponding pay process. Click Payslip and fill in the following two fields:

Field name	Description / Example
Direct delivery	By checking this box, you determine that the payslips should be provided to the employees in SwissSalary Direct.
Directly visible from	You can define the time when the employee can see payslips in SwissSalary Direct. As of this date, the employee will also receive email notifications about new documents made ready.
Direct no email notification	Email notification to employees can generally be switched off in SwissSalary Direct settings (field 'No email notification'). This is useful, for example, when several documents are sent one after the other, but the employee is only notified once by email.  We have now created the possibility to control this for each document type with document types 'Payslip', 'Salary certificate' and 'Report card' for File ZIP archive import as well as for sending of documents in general. In addition to the existing options 'Direct delivery', 'Directly visible from', you will now also find another option 'No direct email notification'. If this option is switched off, employees will be informed via email as before.

By clicking Preview or Print, the documents are prepared and sent. It is relevant what is kept in settings (sending to all employees or sending to registered employees).

Following the electronic delivery, all payslips are displayed for non-registered employees and can now be printed and sent physically. SwissSalary keeps record of employees registered in SwissSalary Direct (see the "SwissSalary Direct rollout date" field on the Personnel list).

Note:

Until an employee registers in the SwissSalary Direct, the payslip is created for printing as before. Certain text with the link and personal registration code is printed on the physical payslip automatically. For example, the following text may be displayed:

Your registration code is 1234-56E8-9AB2-345Z.

You can register at [example.swissalarydirect.ch](http://example.swissalarydirect.ch) using this code.

This text will only be displayed on the payslip until the employee registers for SwissSalary Direct.

### 4.2 Salary certificate

To send wage statements in SwissSalary Direct, proceed as follows:

Open the “Wage Reporting” area, click “REPORT” and then “Salary certificate statement (Form 11)”. Please note now that you can work with filters for one or all employees. The delivery occurs accordingly.

Field name	Description / Example
Direct delivery	By checking this box, you determine that the wage statements should be provided to the employees in SwissSalary Direct.
Directly visible from	You can define the time when the employee can see wage statements in SwissSalary Direct. As of this date, the employee will also receive email notifications about new documents made ready.
Direct no email notification	<p>Email notification to employees can generally be switched off in SwissSalary Direct settings (field ‘No email notification’). This is useful, for example, when several documents are sent one after the other, but the employee is only notified once by email.</p> <p>We have now created the possibility to control this for each document type with document types ‘Payslip’, ‘Salary certificate’ and ‘Report card’ for File ZIP archive import as well as for sending of documents in general. In addition to the existing options ‘Direct delivery’, ‘Directly visible from’, you will now also find another option ‘No direct email notification’. If this option is switched off, employees will be informed via email as before.</p>

By clicking Preview or Print, the documents are prepared and sent. It is relevant what is kept in settings (sending to all employees or sending to registered employees).

Following the electronic delivery, all wage statements are displayed for non-registered employees and can now be printed and sent physically. SwissSalary keeps record of employees registered in SwissSalary Direct (see the “SwissSalary Direct rollout date” field on the Employee list).

### 4.3 Providing other documents

You can also provide your employees with PDF documents that have not been created in SwissSalary. This procedure is described in Chapter: Settings in SwissSalary.

### 4.4 Dossier ZIP Archive Import

#### Creation of Documents

Create personalized documents and save them in a folder. No other documents should be in this folder. Pay attention to the name of the document. It should look as follows:

#### Example:

1234\_StundenAugust.pdf

Text / Example	Description
1234	Employee N° for the purpose of clear assignment in SwissSalary Direct
_(Underline)	Separation between the personnel number and the file name

---

StundenAugust	Description of the document => will be accordingly displayed to the employee in SwissSalary Direct
.pdf	file format

### **Dossier ZIP Archive Import**

In SwissSalary, open the ZIP archive import dossier via the search function.

- Select the folder to be sent.
- A text can be entered in the description which is displayed to the employees.
- Define document type
- Direct delivery and date similar to payslips/ wage statement
- Confirm by clicking OK

The documents provided by means of dossier ZIP archive import are subsequently also visible in the SwissSalary Direct administration and could be deleted there if required.

---

## 5 Company

### 5.1 Copying Company

It is always possible to copy company. Contact SwissSalary Support in advance to plan the procedure and ensure the smoothest possible process. If SwissSalary Support is involved at an early stage, there is a possibility in most cases that employees will not have to go through the whole registration process again.

### 5.2 Merging Company

It is always possible to merge company. Contact SwissSalary Support in advance to plan the procedure and ensure the smoothest possible process. If SwissSalary Support is involved at an early stage, there is a possibility in most cases that employees will not have to go through the whole registration process again.

### 5.3 Splittings Company

It is always possible to split one client into multiple clients. Contact SwissSalary Support in advance to plan the procedure and ensure the smoothest process possible. If SwissSalary Support is involved at an early stage, there is a possibility in most cases that employees will not have to go through the whole registration process again.

### 5.4 Changing Company

Employees go to "sister company" using the same subdomain for SwissSalary Direct. It is important that both clients are previously set up for SwissSalary Direct and both clients are managed via the same subdomain (xxxx.swissalarydirect.ch).

In this case, it is not necessary to register again. The procedure goes as described below

- Employees with existing access log in as usual for "old" clients
- Enter the registration code from the second client printed on the new payslip in the top right corner under "User Settings"
- Enter information accordingly
- As soon as the new / second registration code has been entered, the employee can click the client name in the top left corner to switch the client back and forth with a single login (home page)
- The access to the documents from the old client is similar to the rules for resignation, 30/360/365 days after "Resignation"

## 6 Dashboard Employee

Example from Dashboard **Advanced** :

### Dashboard

Hello Mr. Hofstetter

#### Contact details

 | Edit

Yannick Hofstetter

OASI-No.: 756.4641.8683.11

Mobile: +41 79 325 65 87

Private Email: y.hofstetter@direct.ch

Address: Hauptstrasse 10

6003 Luzern

**Valid from 01.08.2022**

#### Bank

 | Edit

Die Schweizerische Post - Post

CH49 0900 0000 3044 7353 4

#### Documents

 | Upload files 


New


Read


Sent

Sickness & Accident Reporting

#### Selected documents

 | Download

 | Move to Read

 Search



↑↓ Description

↑↓ Date



Lohnabrechnung Januar 2022

21.06.2022 4:20:47 PM



Kassenbon

21.06.2022 4:16:54 PM



Lohnabrechnung Februar 2018

09.06.2022 11:03:08 AM



Lohnabrechnung Januar 2018

09.06.2022 11:03:07 AM

## Contact details



First name

Yannick

Last name

Hofstetter

Old-age & survivors insurance

756.4641.8683.11

Private Email

y.hofstetter@direct.ch

Phonenumber (Landline)

Phonenumber (Mobile)

+41 79 325 65 87

Address

Hauptstrasse 10

Zip Code

6003

City

Luzern

Valid from

01.08.2022



 Save

 Cancel

# Edit Bank



Bank Name

Die Schweizerische Post - P...



BIC (SWIFT)

POFICHBEXXX

Address

Freiburgstrasse 453

Zip Code

3002

City

Bern

IBAN


CH49 0900 0000 3044 7353 4

Deviating

Beneficiary

Foreign bank

 Save

 Cancel

# Dashboard

Hello Mr. Hofstetter



## Contact details | Edit

Yannick Hofstetter  
OASI-No.: 756.4641.8683.11  
Mobile: +41 79 325 65 87  
Private Email: y.hofstetter@direct.ch  
Address: Hauptstrasse 10  
6003 Luzern  
**Valid from 01.08.2022**

## Bank | Edit

Die Schweizerische Post - Post  
CH49 0900 0000 3044 7353 4







## Documents

 | Upload files 

[New](#) [Read](#) [Sent](#) **Sickness & Accident Reporting**

### My Sickness & Accident History

 | **New Report**

 Report	 Insurance case	 Type	 Details	 Incident date	 Status	Actions
No data available in table						



# Report

new report

- Incident
- Accident
- Injuries
- Treatment
- Attachments
- Release

## New Incident

What happened?

I had an accident.

Have you been on your way to work, or have you been working for CRONUS AG when it happened?

No

What kind of accident was it?

Sorry, but I'm not sure...

When did it happen?

How accurate is this timestamp?

I have no idea...

How regularly do you work? ⓘ

Regularly

Are you still able to work?

That still needs to be clarified.

Save and continue

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## 7 Registrations of employees

Employees receive their personal registration code and the link on the payslip. Helpful registration instructions are available at [www.youtube.com](http://www.youtube.com). Look for “SwissSalary Direct” on YouTube and you will be able to see them in different languages.

The procedure is as follows:

1. The link and personal registration code are printed on the payslip
2. The employee can open any browser and enter the link in the address bar (Warning: if you paste it in Google or other search engine, you will not get to the desired page)
3. On the SwissSalary Direct page the employee clicks “New here? Do you have a registration code?”
4. The employee fills in the following fields
  - Registration code
  - Email\*
  - Confirm your email\*
  - Password
  - Confirm password
  - Finally, click “Register”
5. The employee receives an email to the specified address and must click this link.

Afterwards, the registration is completed and the employee can log in directly by entering his/her email and password.

The registration using registration code occurs once. It is important to complete the registration and click the link in the confirmation email. The SwissSalary Direct page with the corresponding information about a successfully completed registration should open. Sometimes errors occur, either because the emails end up in the spam folder due to the “no-reply” address or pop-up blockers prevent the website from being opened.

\* If the “Email verification” feature is activated, the employee can only register with the email address stored in the SwissSalary Personnel Card and selected for “Electronic delivery”

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## 8 Password Reset

After the registration has been completed successfully, the employee can independently reset the password at any time. To do this, the employee needs access to his/her registered email address used as the username. If the employee has forgotten the password and does not have access to the stored email address, the entire registration must be reset via SwissSalary Support. Afterwards, the employee can repeat the registration using the unmodified registration code.

If email verification is activated, the new email address must be stored on the Employee Card and synchronized with SwissSalary Direct.

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## 9 Registration Control and Possible Error Messages

If an employee reports that the registration failed or access is impossible, the following points will help to determine the cause:

In SwissSalary Direct:

Check employee details. A date must be entered for the registration date and the email must be confirmed. Otherwise, the registration has not been completed. Did the company enable email verification? Then the registration is only possible using the email address stored in SwissSalary: it must be stored in the Employee Card, otherwise the registration is impossible. The employee should go through the registration process again. If need be, it is also possible if an employee made a typing error in the username, and then the registration can be repeated with the correct email address.

In SwissSalary:

Add the "SwissSalary rollout date" column to the Employee list and check whether the date is displayed there. It is only displayed when the registration has been completed.

Error message: Invalid registration code:

a new code cannot be generated. It is personalized and remains valid. The employee should try all possible options. For example, it can include an O, which can be both a letter and a zero.

Employee receives no confirmation email:

A confirmation email must be received. If necessary, check the spam folder. The email used by the employee to log on using the intended username can be initiated again. A message appears stating that the confirmation is pending and it is possible to initiate the email again. This confirmation email contains a link, click it and wait until the SwissSalary Direct website opens and the corresponding completion message appears. Pop-up blockers can also cause an error here and prevent the site from opening.

If the email is not received numerous times, the sender address `no-reply@swissalarydirect.ch` should be added to the secure addresses.

Registration reset:

Employee registration can be reset. However, only SwissSalary Support can do it. The documents made available before the Unregister process are still available to the employee after a re-registration. The original registration code remains valid as well.

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## 10 Employee Card Dossier

The Dossier can be retrieved in the Employee Card. In this table, you can use the Direct Upload on column, and Direct and Visible from respectively to control which documents were provided in SwissSalary Direct for the employee. If a new document is added here, the upload can be prepared by means of entries in columns Direct (check mark) and Directly visible from. Such employee-specific documents are sent by executing the Send document function.