

# RFI Profile Setup

## **Disclaimer:**

The Knowledge Base is our platform to share information with our customers and provide you with a 'help me, help myself' environment. The guides and documents provide step by step solutions to assist you with your queries based on the acquisition of solutions from previous enquiries.



## **Important Note**

- The information contained in these articles should be treated as guidelines.
- Some articles are version and build specific.
- Articles may not be applicable to all environments.
- If the proposed solution is not successful, please post your comments below or contact the Sage Pastel Payroll and HR Department directly on (011) 304 4300 or [support.pastelpayroll@sage.com](mailto:support.pastelpayroll@sage.com)

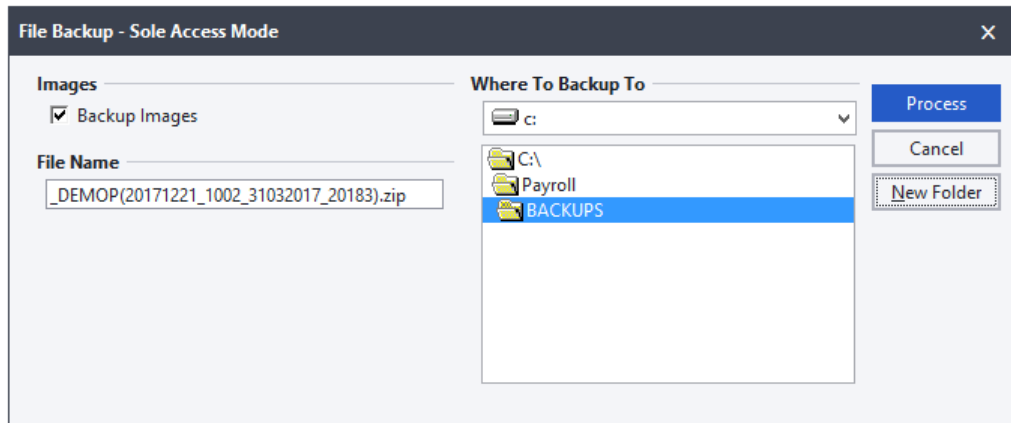
## FAQ

### Question:

How do I setup an RFI Profile within Sage Pastel Payroll & HR?

### Solution:

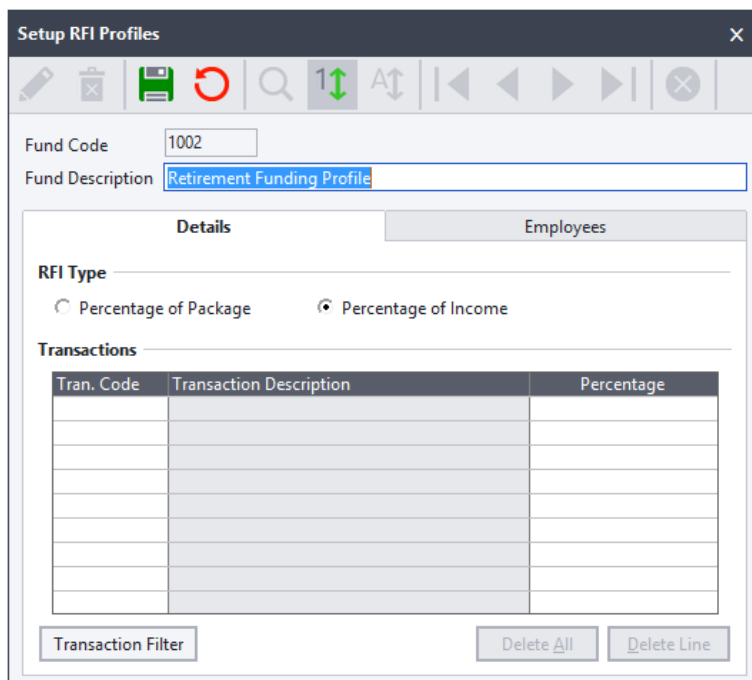
1. Make a backup of your data by going to **File...Backup**
2. Select the directory on your computer where Pastel Payroll must save the backup.
3. The following screen is displayed:



4. Select **Process**.

**Note:** Do not make Backups in your Company folder, always Backup to a separate folder.

5. Go to **Setup...Retirement Funding...RFI Profiles**
6. In the Fund Code field, enter a code. This code can be up to four alphanumeric characters.



7. In the Fund Description field, enter the fund name.

8. In the RFI Type section, select if the fund should calculate on the Package of the employee or on the Income of the employee.
9. On the Details tab, enter the Transactions/Tax total applicable, on which Provident, Pension or Retirement Annuities are based.  
Eg. Basic Salary transaction - 5000

**Setup RFI Profiles**

Fund Code: 1002  
Fund Description: Retirement Funding Profile

**Details** | Employees

RFI Type  
 Percentage of Package     Percentage of Income

**Transactions**

Tran. Code	Transaction Description	Percentage
5000	Basic Salary	8.00
5200	Annual Bonus	5.00
5321	Overtime @ 1.5	3.00
5323	Overtime @ 2	3.00

Transaction Filter      Delete All      Delete Line

10. Select the **Employees** tab, in order to select the applicable employees who belong to the fund with the above setup.

**Setup RFI Profiles**

Fund Code: 1002  
Fund Description: Retirement Funding Profile

Details | **Employees**

**Employees linked to RFI Profile**

Employee Code	Employee Name
001	John Brown
002	Sandy Smith

Employee Filter      Delete All      Delete Line

11. Save the changes.
12. The Provident, Pension or Retirement Annuity can now be processed on the **Process...Payslips** screen