

To change Group Name follow the steps below:

Step 1: Go to the 'Pension' Menu in the tasking Zone and select the submenu 'Auto Enrolment Pension Setup'.

Step 2: Select the pension provider

Step 3: Click on 'Additional AE Pension settings'

Step 4: Click on 'View/Edit' link corresponding to the respective scheme.

Step 5: Then click on 'Edit' button.

Step 6: Change the Group Name under Pension Scheme Details

Step 7: Then click on 'Save' button.

Road Map - To change Group Name

Pension -> Auto Enrolment Pension Setup -> Pension Provider -> Additional AE Pension settings -> View/Edit -> Edit -> Scheme Name / Group Name -> Save.

('Pension' is the button positioned in the tasking zone menu at the top. It is the third button from the right)

To change Payment Source Name follow the steps below:

Step 1: Go to the 'Employer/Setup' Menu in the tasking Zone and select the submenu 'Employer Details'.

Step 2: Now click on 'View/Edit' button next to Employer Bank Details.

Step 3: Click on 'View/Edit' link corresponding to the respective Bank Name.

Step 4: Then click on 'Edit' button.

Step 5: Change the Payment Source Name under Employer Bank Details.

Step 6: Then click on 'Save' button.

Road Map - To change Payment Source Name

Employer/Setup -> Employer Details -> Employer Bank Details -View/Edit -> View/Edit -> Edit -> Employer Bank Ref./ Payment Source Name -> Save

('Employer/Setup' is the button positioned in the tasking zone menu at the top. It is the first button from the left.)