

SmartPayroll

It pays to get it right.

4 simple steps to start using SmartPayroll!



Step 1: Sign up

Sign up online or let us know if you want a form emailed to you.

Step 2: Set up training

Our Account Services team will give you a call within the next business day, to start getting you set up and discuss any training you require.

Step 3: Provide documents and employee's information

We'll then send you an email with your login details so you can start setting your employees up. Or you can send us some reports from your existing payroll provider to speed this up. We'll also send some documents for you to sign and return.

Step 4: Get started!

Once your employees are set up, you can use SmartPayroll for your next pay run. To start automating payments, we'll need all signed documents and confirmation from your bank. We'll let you know when we have bank confirmation, this usually takes up to 5 days, or for ASB banking customers around 2 weeks.

Switching from Crystal Payroll

When switching from Crystal Payroll, there's a couple of reports you can provide us to make the transition easier for you.

Crystal reports to provide:

Report One: Company Employee List Report

- We will use these to load your staff details . You can send us these at any time.

Company Employee List

First Name:	IRD Number:
Last Name:	Tax Code: M
Known As:	Home Phone:
Title Of Courtesy: Mr	Mobile:
Date of Birth:	E-mail:
Address:	Send Payroll by Email
Postal Code:	Emergency Phone:
Job Title: Director	Emergency Contact:
Reports to:	Work Phone:
Commenced on: 20/11/2017	Work Place:
	Contract Type:
First Name:	IRD Number:
Last Name:	Tax Code: ME SL
Known As:	Home Phone:
Title Of Courtesy: None	Mobile:
Date of Birth:	E-mail:
Address:	Send Payroll by Email
Postal Code:	Emergency Phone:
Job Title: Mechanic (Apprentice)	Emergency Contact:
Reports to:	Work Phone:
Commenced on: 1/10/2018	Work Place:
	Contract Type:
First Name:	IRD Number:
Last Name:	Tax Code: ME SL
Known As:	Home Phone:
Title Of Courtesy: Mr	Mobile:
Date of Birth:	E-mail:
Address:	Send Payroll by Email
Postal Code:	Emergency Phone:
Job Title:	Emergency Contact:
Reports to:	Work Phone:
Commenced on: 6/11/2017	Work Place:
	Contract Type:

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Report Two: Employee Pay Rate Analysis Report

- We will use these to load your staff details . You can send us these at any time.

Employee Pay Rate Analysis

Report Date as at: 8/04/2020

Employee Name	Commenced Date	Current Pay Rate		Previous Pay Rate 1		Previous Pay Rate 2	
		Start Date	Wage Rate Yearly Salary	Start Date	Wage Rate Yearly Salary	Start Date	Wage Rate Yearly Salary
	20/11/2017	29/08/2019	\$31.60	14/07/2018	\$26.50	7/04/2018	\$29.00
	1/10/2018	18/07/2019	\$19.00	1/04/2019	\$17.70	1/10/2018	\$17.00
	26/02/2020	26/02/2020	\$19.00				
	5/10/2018	5/10/2018	\$22.00				

Total number of employees: 4

Report Three: Leave Entitlement Summary

- Once you've run your last pay through Crystal please send us the Leave Entitlement Summary. We will use this to ensure all balances are transferred correctly and start accruing from the correct date.

Leave Entitlement Summary

Report Date as at: 8/04/2020

Employee Name	Annual Holiday					
	Start Date	Due Hours	Next Anniversary	Accrued by %	Accrued Hours	Total Hours
	20/11/2017	294.20	20/11/2020	7.6923	65.54	359.74
	1/10/2018	-47.50	1/10/2020	7.6923	92.09	44.59
	26/02/2020	0.00	26/02/2021	7.6923	10.31	10.31
	5/10/2018	5.00	5/10/2020	7.6923	53.68	58.68
Gross Total:		251.70			221.62	473.32