

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 IMS Payroll

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

IMS reports to provide:

Report One: Employee Listing Report

- The Employee Listing Report should have the "Kiwisaver Contributions" box ticked. We will use this to load your staff details. You can send us this at any time.

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Date Run: 15/06/2020 Time: 9:59 AM **EMPLOYEE LISTING**

Report Options:
 Employee Range: All Employees
 Detail Options: Full Details

STANDARD

Personal
 First Names: Surname:
 Address: Preferred Name:
 Gender: Female
 Employee No.:
 Birth Date: 22/12/1977 Age: 42
 Daytime #: 021 180 1512
 Mobile #:

E-mail:
 Job
 Occupation: Farm Assistant/Farm Hand Start Date: 01/07/2019 Apprentice: No
 Pay Point: Finish Date:
 Coating Code: Due Back:
 ACC Class Unit: Review Date:
 Contract:

PAYMENT

Pay Frequency: Weekly Employee Type: Salary per Pay: \$1,200.00

Tax Details
 Student Loans per Hour: \$23.1688 GSCM: No
 IRD Number: IRD override: Rate 2: \$0.00 per Year: \$62,400
 Income Type: Rate 3: \$0.00 Chk ADP: No
 TAX Code: N Rate 4: \$0.00 - Hourly Rate: N/A
 EWAY override: Expiry Tax Code: Rate 5: \$0.00 - Daily Rate: N/A
 EWAY override: Standard Days: 6.00
 Contractor: No GST Registered: No

Hours Worked
 Hours per Day: 9.00 No Payallip: No
 Hours per Period: 54.00 Printed: Yes
 Smailed: Yes
 No IMS Online: No

Bank Bank Account: Bank Ref:
 Bank Part:
 Bank Code:

LEAVE

Annual Leave Type: Perm/Set Hrs Annual Leave In: Days Sick Leave In: Days Alt Hols. In: Days

Annual Leave Entitlements
 Full Yrs Ent: 24.00 Net Gross: \$
 Next Ent: 24.00 For: 52 Weeks Full Cycle Ent: 5.00 Mths: 12.00
 Due Date: 01/07/2020 Next Ent: 5.00 Max: 20.00
 Due Date: 01/01/2021 Net Gross: 0

Annual Leave Values
 Outstanding Ent: 0.00 Average Rate: 208.75 Ordinary Rate: 217.37
 Accrued This Yr: 23.00 Gross Earnings: \$57,614.78 Hours: 2502.75
 Paid in Advance: 7.40 Amount in Adv: \$1,549.42

Leave Balances
 Annual Leave: 15.60 Sick Leave: 5.00 Alt. Holiday: 5.00
 Annual Leave Cash up Entitlement: 0.00 Paid Out: 0.00 Balance: 0.00

Time in Lieu
 Leave In: Hours Pay On Termination: No Balance: 0.00

PERMANENT TRANSACTIONS

Payment or Deduction	Quantity	Rate	Costing Code	Costing Description
Rent Allowance	1	300.0000		
Rent Deduction	1	300.0000		
Rent Adjustment	-1	300.0000		

Report Two: Leave History Report

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

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Date Run: 26/09/2019 Time: 4:05 PM **LEAVE HISTORY REPORT** As at Period Ending Date: 25/09/2019

Entitlement for All Employees

NAME	ANNUAL LEAVE				SICK LEAVE		ALTERNATIVE LEAVE	
	DUE DATE	OUTSTND.	ACCRUED	ADVANCED	BALANCE	DUE DATE	BALANCE	BALANCE
	09/01/2020	20.00	142.31	0.00	162.31 hrs	09/06/2020	48.00 hrs	0.00 days
	08/10/2019	0.00	192.31	75.08	117.23 hrs	09/04/2020	8.00 hrs	0.00 days
	09/11/2019	0.00	138.46	0.00	138.46 hrs	09/05/2020	36.00 hrs	0.00 days
	20/07/2020	48.10	4.00	0.00	52.10 days	01/01/2020	53.72 hrs	0.00 days
	25/01/2020	64.56	111.15	0.00	175.71 hrs	25/07/2020	42.50 hrs	0.00 days
	10/08/2020	189.46	19.62	0.00	209.08 hrs	10/02/2020	0.00 hrs	0.00 days
	31/10/2019	0.51	180.77	0.00	181.28 hrs	30/04/2020	126.00 hrs	0.00 days
	09/03/2020	169.50	86.15	0.00	255.65 hrs	09/09/2020	80.00 hrs	1.00 days
	29/10/2019	0.00	144.62	56.00	88.62 hrs	29/04/2020	0.00 hrs	0.00 days
	29/04/2020	0.00	68.65	6.00	62.65 hrs	29/10/2019	0.00 hrs	0.00 days
	15/03/2020	140.00	83.08	0.00	223.08 hrs	15/09/2020	80.00 hrs	0.00 days
	26/04/2020	43.08	68.65	0.00	111.73 hrs	26/10/2019	0.00 hrs	0.00 days
	07/06/2020	64.62	25.96	0.00	90.58 hrs	07/12/2019	12.00 hrs	0.00 days
GRAND TOTALS:		627.11	1261.73	137.08	1816.38 hrs		486.22 hrs	1.00 days
		48.10	4.00	0.00				