

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 Xero Payroll

When switching from Xero's payroll service, there's a few reports you can provide us during to make the transition easier for you.

Xero reports to provide:

Employee Contact Details and Employee Remuneration Report

- Located under the reports tab in the Payroll section. You may need to click the three dots to expand this section. We will use these reports to load your staff details for you.

Reports > **Employee Remuneration Report**

REPORT ON
Employees: All
Employment Status: All
[Update](#)

8 Results

Employee	Start Date	Termination Date	Employee Group	Pay Calendar	Hourly Rate	Annual
Casual Worker	07 Feb 2019		None	Weekly	25.00	0.00
Company Director	01 Mar 2017		None	Monthly	0.00	0.00
Dairy Milker	04 Jan 2018		None	Weekly	28.85	60,000.00
General Manager	07 Jan 2019		None	Weekly	43.27	90,000.00
GST Contractor	30 Jan 2019		None	Weekly	0.00	0.00
Part Time	01 Jul 2019		None	Weekly	25.00	23,400.00
Part-time Worker	05 Oct 2018	21 Jun 2019	None	Weekly	25.00	23,400.00
Permanent Worker	04 Jul 2018		None	Weekly	35.00	72,800.00
Grand Total						269,600.00

[Export](#) [Print](#)

Reports > **Employee Contact Details Report**

REPORT ON
Employees: All
Employment Status: Active
[Update](#)

7 Results

Employee	Employee Group	Address	Email
Casual Worker	None	30 King St Rangiora 7400	
Company Director	None	30 King St Rangiora 7400	
Dairy Milker	None	30 King St Rangiora 7400	
GST Contractor	None	1 Queen St Auckland 1010	
General Manager	None	30 King St Rangiora 7400	
Part Time	None	30 King St Rangiora 7400	
Permanent Worker	None	30 King St Rangiora 7400	

Leave Balances, Leave Liability and Pay History

- Once you've run your last pay through Xero please send us the "Leave Balances" report (with the leave type "All" selected), "Employee Leave Liability" and "Pay History" reports. We'll use these to ensure all balances are transferred correctly and start accruing from the correct date.

Reports > **Leave Balances Report**

REPORT ON
Employees: All
Effective Date: 26 Jun 2020
Leave Type: All
[Update](#)

24 Results

Employee	Employee Group	Leave Type	Quantity
Casual Worker	None	Alternative Holidays	0.0000
Dairy Milker	None	Alternative Holidays	16.0000
General Manager	None	Alternative Holidays	0.0000
Part Time	None	Alternative Holidays	0.0000
Permanent Worker	None	Alternative Holidays	0.0000
Casual Worker	None	Annual Leave	0.0000
Dairy Milker	None	Annual Leave	120.0000
General Manager	None	Annual Leave	0.0000
Part Time	None	Annual Leave	0.0000
Permanent Worker	None	Annual Leave	96.0000
Dairy Milker	None	Family Violence Leave	80.0000
General Manager	None	Family Violence Leave	80.0000
Part Time	None	Family Violence Leave	0.0000
Permanent Worker	None	Family Violence Leave	80.0000

Pay History

Demo Company (NZ)
For the period 23 July 2019 to 23 July 2019

Payment date	Employee	Pay item type	Pay item	Employee group	Quantity	Rate	Amount
23 Jul 2019	Company Director	Earnings	Directors Fees	None	-	-	1,000.00
23 Jul 2019	Company Director	Employee tax	PAYE	None	-	-	330.00
23 Jul 2019	Company Director	Payment	Payment	None	-	-	670.00
23 Jul 2019	Company Director	Superannuation	Net Superannuation	None	-	-	-

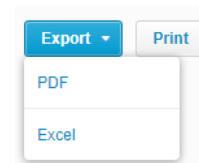
Leave Liability

Demo Company (NZ)
As at 06 Jul 2020

Employee	Avg Weekly Earnings (per hour)	Ordinary Weekly Pay (per hour)	Annual Leave Due (hours)	Annual Leave Cash (per hour)	Total Annual Leave (hours)	Annual Leave Due @ 4.00E (per hour)	Annual Leave - Parental Due @ 4.00E (per hour)	Alternative Holidays Due @ 4.00E (per hour)	Alternative Holidays Due @ 4.00E (per hour)	Holiday Pay on AL, 4.00E (per hour)	Holiday Pay Due (per hour)	Total Liability
Casual Worker	25.00000	25.00000	0.0000	0.0000	0.0000	0.00	0.0000	0.00	0.0000	0.00	0.00	0.00
Company Director	0.00000	0.00000	0.0000	0.0000	0.0000	0.00	0.0000	0.00	0.0000	0.00	0.00	0.00
Dairy Milker	0.00000	33.04234	120.0000	0.0000	120.0000	4,801.54	0.0000	0.00	16,000	141.54	308.25	7,732.88
General Manager	0.00000	43.26231	0.0000	0.0000	0.0000	0.00	0.0000	0.00	0.0000	0.00	0.00	3,738.46
GST Contractor	0.00000	0.00000	0.0000	0.0000	0.0000	0.00	0.0000	0.00	0.0000	0.00	0.00	0.00
Part Time	0.00000	25.00000	0.0000	0.0000	0.0000	0.00	0.0000	0.00	0.0000	0.00	0.00	36.00
Permanent Worker	0.00000	35.00000	96.0000	0.0000	96.0000	3,360.00	0.0000	0.00	0.0000	0.00	368.80	3,748.80
Totals			216.0000	0.0000	216.0000	7,423.54	0.0000	0.00	16,000	141.54	637.05	15,238.14

Exporting to Excel

When exporting your reports, export to excel to ensure your on-boarding processing is as quick as possible.



Additional information we'll need:

- Employee Bank Account Number
- Employee Tax Code
- Employee IRD Number