

Take your business to the next level

MYOB EXO Employer Services

Payroll

– Employee Maintenance



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Suite 22, Ocean Central, 2 Ocean Street, Maroochydore, 4558

🖹 +617 5479 1877 🚊 +617 5345 5267



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This training manual has been developed by the MYOB Enterprise Division - Professional Services Team for use in the delivery of training.

This manual uses a simple step-by-step approach to give you the skills and knowledge necessary to set up and edit employees in EXO Payroll.

This manual has been designed for the following MYOB product:

• EXO Payroll

EXOPEMP

Employee Maintenance

EXO Payroll

Course duration: 0.5 hrs

MYOB Australia Pty Ltd

ABN 13 086 760 198

Website: myob.com.au

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Participants

This course is aimed at:

• Users of EXO Payroll.

Prerequisites

Basic PC experience is required.

Understanding of payroll processes and procedures.

Instructional method

The instructional method uses examples of system configuration. The instructional method makes use of trainer-led exercises. Each unit concludes with a Review Task.

Conventions used in this manual

- Objects such as buttons or icons that you must click or select are shown in **bold**.
- Information to be entered (typed in) or selected is shown in **bold and italics**.
- Keyboard keys are shown as TAB, CTRL, etc.

Screenshots in this manual are for illustration purposes only and may differ from those in the actual product due to configuration settings.

Symbols used in this manuals

Symbol	Name	This symbol tells you
	Practice task Review task	to complete a task to practice the skills you have just learnt, or as a review task at the end of the unit to consolidate what you have learnt.
	Written Review task	to complete written questions to review the content covered in the unit.
	Optional Challenge	to complete this task if you have finished early and are looking for an extra challenge.
	Тір	about helpful tips
	Note	to take note of an important message.
MAR CONTRACTOR	Warning	about potential problems to be aware of.
V	Important	to pay attention to an important notice.
SNew 3	New	where features are new for EXO Payroll.
EE	Reference	where to go to find more information.
- Company	Skills Checklist	to tick off a list of skills that you have learnt during the unit.

Objectives

Upon completion of this course you will be able to:

• Set up Employees

Before you begin:

This training manual has been designed for use with the Demonstration Company and assumes that you do not have any other MYOB Employer Services products, e.g EXO Time and Attendance.

- 1 From the Login screen, double-click on the Demonstration Company.
- 2 From the Utilities menu, click on Setup Exo Payroll.
- 3 From the list of setup areas, click on *Other Setup*.
- 4 Click on the Wages section.
- 5 Ensure that the options "Do not copy wages for Time and Attendance employees" and "Do not copy wages for Rapid employees" are not selected.
- 6 Click on the Save button or press F10.

Function Keys

F1	Help
F2	Maintenance Menu
F3	Change Sort
F4	Add
F5	Edit
F6	Delete
F7	Previous
F8	Next
F9	Find/Print
F10	Save
F11	About Screen
F12	Employee Notes
Page Up/Page Down	Switch between pages
Alpha/Numeric Keystrok	Activates incremental search of picklists
Spacebar	Opens dropdown lists
Home	Skips to start of field
End	Skips to end of field
Tab	Skips to next field
Shift+Tab	Skips to previous field
Ctrl+H	Activates the hide screen, which can only be unlocked using the password you logged in with.
Ctrl+D	Activates the Diary. This is a form of daily planner, providing you with a place to enter comments on any given day for payroll company-related tasks, appointments and reminders.
Ctrl+L	Activates the Calculator.

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Employee Maintenance

In this unit, you will learn how to set up new employees, edit an existing employee's records, set up leave entitlements and set up a standard pay.

By the end of this unit, you will be able to:

- Set up a new employee
- Edit an existing employee record
- Set up Leave entitlements
- Set up a Standard Pay

Overview

This section details the steps and areas that need to be completed when setting up a new employee.

The Employee Maintenance is divided into the following 6 sections:

Employee Details

This section contains the employee's personal details and tax classification.

Leave Entitlements

This section contains the employee's entitlements to Annual Leave, Personal Leave and Long Service Leave.

Other

This section contains the employee's e-mail address, Rostered Days Off entitlements (if applicable) and other options relating to how this employee's payroll information is entered.

User Defined

This section contains a number of user definable fields to store additional employee information.

Notes

This section contains all the employee's payment history notes.

Standard Pay

This section contains the employee's pay template of what they are normally paid per pay period.

To Add a new Employee

1 From the File menu, select New Employee.



Add Employee

- 2 The Enter New Employee Code field will automatically display the highest available employee number. Override this number if you want to assign a different number to the employee.
- 3 Click on the Add Employee button to add the employee to the system.





When adding a new employee, you do not have to save after completing each section. You can save once you have completed the employee's setup.

To Edit an existing Employee

1 From the File menu, select Open Employee.

Employee	23
Enter Employee Code or Alpha Code:	
Find : F9	

Find Employee

2 In the Enter Employee Code or Alpha Code field, enter either the employee code or their alpha code.



You can also find the employee by clicking on the **Find** button or pressing **F9**. You can also change the order from **Code** to **Alpha Code** by clicking on the **Change Sort Order** button, using **F3** or by clicking on the column headings.

3 Press TAB, click on the Find button or press F9 to load the employee's details.

Employee Details

To enter an employee's personal details:

Click on the **Employee Details** tab if this screen is not active.

Required Information Tax Classification Code: 1 Surname: Wallace First Names: Edward James Alpha Code: WALLACE Stant Date: 06/01/1995 Cost Centre: 2210 NSW/Accounts Department: 2 Accounts Pay Frequency: Weekly Payslip Name: James Wallace Address Line 1: 134 March Road Address Line 2: Suburb: Suburb: Richmond State: NSW → Post Code: State: NSW → Post Code: Mobile: 026-889-6557 Occupation: Accounts Clerk	Employee Detail	s Leave Entitlements	Other	User Defined Notes Standard Pay
Code: 1 Surname: Wallace First Names: Edward James Alpha Code: WALLACE Start Date: 06/01/1995 Cost Centre: 2210 NSW/Accounts Department: 2 Accounts Payslip Name: James Wallace Address Line 1: 134 March Road Address Line 2: Standard Hours: Suburb: Richmond State: NSW - Post Code: State: NSW - Post Code: Mobile: 026-889-6557 Occuption: Accounts Clerk	- Required Inform	nation		Tax Classification
Surname: Wallace First Names: Edward James Alpha Code: WALLACE Start Date: 06/01/1995 Cost Centre: 2210 NSW/Accounts Department: 2 Accounts Pay Frequency: Weekly Payslip Name: James Wallace Address Line 1: 134 March Road Address Line 2: Wage Suburb: Richmond State: NSW - Post Code: Telephone: (02) 9223 9978 Mobile: 026-889-6557 Occupation: Accounts Clerk	Code:	1		TFN: 211212201 FTB 0
First Names: Edward James Alpha Code: WALLACE Start Date: 06/01/1995 Cost Centre: 2210 NSW/Accounts Department: 2 Accounts Pay Frequency: Weekly Payslip Name: James Wallace Address Line 1: 134 March Road Address Line 2: Suburb: Suburb: Richmond State: NSW - Post Code: Telephone: (02) 9223 9978 Mobile: 026-889-6557 Occupation: Accounts Centre: Paysing Name: 206-889-6557 Optimized Centre: 102-889-6557 Optimized Centre: 102-889-6557	Surname:	Wallace	_	Standard Employee
Alpha Code: WALLACE Start Date: 06/01/1995 Cost Centre: 2210 NSW/Accounts Department: 2 Accounts Pay Frequency: Weekly Payslip Name: James Wallace Address Line 1: 134 March Road Address Line 2: Wage Suburb: Richmond State: NSW - Post Code: Telephone: (02) 9223 9978 Mobile: 026-889-6557 Occupation: Accounts (Lerk	First Names:	Edward James		
Start Date: 06/01/1995 Cost Centre: 2210 Department: 2 Accounts Flood Levy Pay Frequency: Weekly Payslip Name: James Wallace Address Line 1: 134 March Road Address Line 2: Wage Suburb: Richmond State: NSW Country: Australia Telephone: (02) 9223 9978 Mobile: 026-889-6557 Occupation: Accounts Clerk	Alpha Code:	WALLACE		Medicare Exemption: None 💽 Scale 2
Cost Centre: 2210 NSW/Accounts [FY 2011/12 settings IV Flood Levy IV Leave Loading Department 2 Accounts Image: Earnings are Not Liable for Payroll Tax Pay Frequency: Weekly Image: Earnings are Not Liable for Payroll Tax Payslip Name: James Wallace Male Image: Full-time Address Line 1: 134 March Road Male Image: Full-time Address Line 2: Image: Full-time Image: Full-time Image: Full-time Suburb: Richmond Image: Full-time Image: Full-time Image: Full-time State: NSW IP Post Code: Standard Hours: 40.00 per pay 8.00 per Telephone: (02) 9223 9978 Birth Date: 26/03/1962 Age: 50.5 Occupation: Accounts Clerk Answel Payroins: ///	Start Date:	06/01/1995		🗹 Claim Tax Free Threshold
Department 2 Accounts Pay Frequency: Weekly Image: Standard Hours: 3498 Image: Vuse WorkCover rail Payslip Name: James Wallace Male Image: Full-time Image: Vuse WorkCover rail Address Line 1: 134 March Road Male Image: Full-time Image: Vuse WorkCover rail Address Line 2: Image: Vuse WorkCover rail Image: Vuse WorkCover rail Image: Vuse WorkCover rail Suburb: Richmond Image: Vuse WorkCover rail Image: Vuse WorkCover rail State: Image: Vuse WorkCover rail Image: Vuse WorkCover rail Country: Australia Image: Vuse WorkCover rail Mobile: 0026-889-6557 Due Back Date: 1/1/1 Occupation: Accounts Clerk Answel Review: Vuse 1/1/1	Cost Centre:	2210 NSW/Accour	nts	(FY 2011/12 settings 🔽 Flood Levy 🔲 Leave Loading)
Pay Frequency: Weekly VorkCover: 3498 V Use WorkCover rate Payslip Name: James Wallace Male Full-time V Address Line 1: 134 March Road Male Full-time V Address Line 2: Wage Permanent V Suburb: Richmond Vage Permanent V State: NSW Post Code: Standard Hours: 40.00 per pay 8.00 pe Telephone: (02) 9223 9978 Birth Date: 26/03/1962 Age: 50.5 Mobile: 026-889-6557 Due Back Date: 7 /	Department:	2 Accounts		Earnings are Not Liable for Payroll Tax
Payslip Name: James Wallace Address Line 1: 134 March Road Address Line 2: Wage ▼ Permanent ▼ Suburb: Richmond State: NSW ▼ Post Code: Ocupry: Australia Telephone: (02) 9223 9978 Mobile: 026-889-6557 Occupation: Accurd Resident	Pay Frequency:	Weekly 🔹		WorkCover: 3498 🔽 Use WorkCover rate
Address Line 1: 134 March Road Address Line 2: Suburb: Richmond State: NSW - Post Code: 3130 Country: Australia Telephone: (02) 9223 9978 Mobile: 026-889-6557 Occupation: Accounts Clerk Mosting: Accounts Clerk	Payslip Name:	James Wallace	-	Male
Address Line 2: Suburb: Richmond State: NSW Post Code: 3130 Country: Australia Telephone: (02) 9223 9978 Mobile: 026-889-6557 Occupation: Accounts Clerk Australia Counts Clerk Counts Clerk	Address Line 1:	134 March Road	_	
Suburb: Richmond State: NSW Post Code: Ocuntry: Australia Telephone: (02) 9223 9978 Mobile: 026-889-6557 Occupation: Accounts Clerk	Address Line 2:			Wang - Downson -
State: NSW Post Code: [3130 Country: Australia Telephone: (02) 9223 9978 Mobile: 026-889-6557 Occupation: Accounts Clerk	Suburb:	Richmond		jvvage 💽 Permanent 💽
Country: Australia Standard Hours: 40.00 per pay 8.00 per pay Telephone: (02) 9223 9978 Birth Date: [26/03/1962] Age: 50.5 Mobile: 026-889-6557 Due Back Date: [7] Occupation: Accounts Clerk Annuel Dations [4]	State:	NSW - Post Code: 3130		
Telephone: (02) 9223 9978 Birth Date: 26/03/1962 Age: 50.5 Mobile: 026-889-6557 Due Back Date: / / Occupation: Accounts Clerk Annual Data insure / /	Country:	Australia		Standard Hours: 40.00 per pay 8.00 per da
Mobile: 026-889-6557 Due Back Date: ///	Telephone:	(02) 9223 9978		Birth Date: 26/03/1962 Age: 50.5
Occupation: Accounts Clerk	Mobile:	026-889-6557		Due Back Date: //
Annual Review. 177	Occupation:	Accounts Clerk		Annual Review: 77
C Apprentice	Apprentice			

Employee Maintenance - Employee Details

Enter the follobwing Details:

Field	Description	
Surname, First Names	Enter the employee's Name in these fields.	
Alpha Code	This code is used as the employee's Alpha Sort and is typically the first 8 characters of their surname. Note: The Alpha Code must be unique.	
Start Date	Enter the employee's date of employment.	
Cost Centre	Enter the employee's Default Cost Centre. Click on the button to get a list of your Costs Centres.	
Department	Enter the employee's Department. Click on the button to get a list of your Departments.	

Pay Frequency	From the dropdown list, select the employee's pay frequency. Note: If the employee is a Casual, no frequency is required.
Address Details	Enter the employee's address details. Note: Only complete the Country field if the employee resides outside Australia.
Telephone	Enter a contact number for the employee.
Mobile	Enter a mobile number for the employee.
Occupation	Enter the employee's occupation or job title.
Apprentice	Select this option if the employee is an Apprenctice. Click on the Apprentice button to enter the details of their apprenticeship.
TFN	If this record is for an Employee, enter the employee's Tax File Number.
ABN	If this record is for a Contractor, enter the contactors' Australian Business Number
Tax Classification	Select the appropriate Tax Classification from the available options.
Earnings are Not Liable for Payroll Tax	Select this option if this employee's earnings are not liable for payroll tax paid by the company.
WorkCover	To use the default WorkCover rate to calculate your WorkCover payments, select the option Use WorkCover rate .
Male/Female	Select the employee's Gender.
Salary/Wage	Specify if the employee is Waged (paid an hourly rate) or Salaried (paid a fixed dollar amount). For a Salaried employee, also select the option Allow Overtime if the employee is paid for overtime hours.
Standard Hours per pay	Enter the employee's standard hours per pay period. <i>Tip: Use the Full-Time equivalent for part-time employees.</i> Note: This field must be completed for all employees entitled to leave. Note: If the employee is entitled to Rostered Days Off, this field must reflect the number of hours <i>worked</i> not <i>paid</i> .

Standard Hours per day	Enter the employee's standard hours <i>per day</i> . Note: If the employee accrues RDO's on RDO's, enter the standard hours the employee works per day. The employee will be paid these hours when taking an RDO with the RDO accrual being deducted from these hours, e.g. if the employee normally works 8.00 hours, 0.05 will be deducted and the employee is paid 7.60 hours for the day. If the employee does not accrue RDO's on RDO's, enter the standard hours the employee is paid per day. The employee will be paid these hours when taking an RDO with no RDO accrual deducted from these hours, e.g. if the employee is normally paid 7.60 hours, no RDO accrual will be deducted and the employee is paid 7.60 hours for the day.
Full-Time/Part- Time/Contractor	Select the employee's Hours of employment.
Trade Labour Content	If this record is for a Contractor, enter the percentage at which the their payroll tax is calculated.
Permanent/Casual/Temporary	Select the employee's Term of employment.
Birth Date	Enter the employee's date of birth.
Due Back Date	Leave this field blank.
Annual Review	Enter the date of this employee's next annual review. This is an optional field.

Full-Time

These employees are employees on a permanent basis and are commonly entitled to leave provisions and notice of termination.

Part-Time

Employees working less than 38 hours per week are classed as part-time employees, yet still have regular, set hours of work. Part-time employees generally receive a pro-rata equivalent of the benefits and entitlements a full-time employees receives.

Casual

Casual employees do not work set hours and are called upon to work ad-hoc hours. Casuals typically do not have guarantee of work beyond their current hiring.

After you have entered all the employee's personal details, click on the Save button or press F10 to ensure the employee is added.

Edit the employee to complete the remaining areas. (Refer to *"To Edit an existing Employee" on page 3*)

Leave Entitlements

	ils	Leave Ent	itlements	Other User	Defined	Notes	Standard Pa
Employee:		1 Walle	ace, Edward Jan	nes			
	Group	Group Entitlement Changes	Entitlement Units	Balance	Cost Centre	e Direct Cost	Other Details
Annual Leave	NL	Edit	160.00 Hours	207.31		2210 🗆	Edit
Personal Leave	PL	Edit	80.00 Hours	104.15		2210 🗆	Edit
Long Service	NSW	Edit	173.33 Hours	454.00		2020	Edit
Claim leave le	ave Load bading tax ve withoul	ng at 0.1 -free threshold	00 % d (valid for periods p rtificate: 0.00	rior to FY 2011/201	2 only)	Edit History	Hours Paid
Days of sick lear							

Click on the Leave Entitlements tab if this screen is not active.

Employee Maintenance - Leave Entitlements



To view a breakdown of the employee's leave balances, click on the **Edit** button under the **Other Details** section for the respective leave type.

Annual Leave

To set up an employee's Annual Leave entitlements

1 In the **Group** field, assign the appropriate Annual Leave Group.

2 The following screen will appear:



Employee Details - Leave Entitlements - Assign Annual Leave Group

- 3 Select the option *From the employee's start date*.
- 4 Click on the **Ok** button.
- **5** The **Entitlement Units** field shows how much leave the employee will accrue each year, based on the rules you've specified in the Annual Leave Group.
- 6 The **Balance** field shows the employee's total entitlement to Annual Leave.
- 7 The **Cost Centre** field records the Cost Centre to which the employee's Annual Leave Paid will be costed.

To enter balances for Annual Leave

1 Click on the **Edit** button under **Other Details** to alter the employee's **Balance** for Annual Leave.



Employee Maintenance - Leave Entitlements - Annual Leave Balances

- 2 In the **Carry Over** field, enter the hours of Annual Leave carried over from your previous system.
- 3 Click on the Save button or press F10.

Personal Leave

To enter an employee's Personal Leave entitlements

- 1 In the **Group** field, assign the appropriate Personal Leave Group.
- 2 The following screen will appear:



Employee Maintenance - Leave Entitlements - Assign Personal Leave Group

- 3 Select the option *From the employee's start date*.
- 4 Click on the **Ok** button.
- **5** The **Entitlement Units** field shows how much leave the employee will accrue each year, based on the rules you've specified in the Personal Leave Group.
- 6 The **Balance** field shows the employee's total entitlement to Personal Leave.
- 7 The **Cost Centre** field records the Cost Centre to which the employee's Personal Leave will be costed.

To enter balances for Personal Leave

1 Click on the **Edit** button under **Other Details** to alter the employee's **Balance** for Personal Leave.

Personal Leave Balances					
Personal Leave Balances					
Carry Over:	96.46				
Year-To-Date: 6.15					
Total Hours: 102.61					
Save : F10 K Cancel					

Employee Maintenance - Leave Entitlements - Personal Leave Balances

2 In the **Carry Over** field, enter the hours of Personal Leave carried over from your previous system.

3 Click on the Save button or press F10.

Long Service Leave

To enter an employee's Long Service Leave entitlements

- 1 In the **Group** field, assign the appropriate Long Service Leave Group.
- 2 The following screen will appear:

Long Service Leave Group	3
You have added this employee to a Long Service Leave Group. Should the new group's rules be applied	
 From the employee's start date. From today's date. 	
Cancel Help	

Employee Maintenance - Leave Entitlements - Assign Long Service Leave Group

- 3 Select the option *From the employee's start date*.
- 4 Click on the **Ok** button.
- **5** The **Entitlement Units** field shows how much leave the employee will accrue each year, based on the rules you've specified in the Long Service Leave Group.
- 6 The **Balance** field shows the employee's total entitlement to Long Service Leave.
- 7 The **Cost Centre** field records the Cost Centre to which the employee's Long Service Leave Paid will be costed.

To enter balances for Long Service Leave

1 Click on the **Edit** button under **Other Details** to alter the employee's **Balance** for Long Service Leave.

Long Service Other Details	(x
Long Service Leave Balances		
Hours Prior to 16/08/1978:	0.00	
Hours between 16/08/1978 and 17/08/1993	145.89	
Hours after 17/08/1993:	218.78	
Year-To-Date:	88.67	
Total Hours:	453.34	
Entitlement Date:	02/09/2013	
Cancel		

Employee Maintenance - Leave Entitlements - Long Service Leave Balances

- 2 If the employee has outstanding Long Service Leave accrued prior to 16 August 1978, enter the hours in the **Hours Prior to 16/08/1978** field.
- 3 If the employee has outstanding Long Service Leave accrued between 16 August 1978 and 17 August 1993, enter the hours in the Hours between 16/08/1978 and 17/08/1993 field.
- 4 If the employee has outstanding Long Service Leave accrued after 17 August 1993, enter the hours in the **Hours after 17/08/1993** field.
- 5 Click on the Save button or press F10.

To load Long Service Leave Accrual (Year To Date)

The Year-To-Date value for Long Service Leave is loaded via a special utility. This utility (LoadLSL) is located on your Employer Services CD. Once this utility is installed, it can be accessed from the **Special** menu in EXO Payroll.

- 1 From the Special menu, select Special Applications.
- 2 Select Load YTD LSL and click on Save or press F10.

6	Long Ser		der		- 8 2	<u>-</u>
	Code	Alpha Code	First Name	Last Name	Year To Date 🔺	
	1	WALLACE	Edward James	Wallace	88.67	
	2	ANDREWS	Thomas Harley	Andrews	95.56	
	3	HOUGHTON	Jannet Faye	Houghton	90.27	
	4	SMITH	Sandra Olive	Smith	277.33	
	5	KEATING	Karl Adrian	Keating	92.67	
	6	RUSSEL	George Thomas	Russel	48.93	
	7	ROBINSON	Henry Karuso	Robinson	195.34	
	8	HILLARY	Matthew Martin	Hillary	224.67	
	9	JACKSON	William Duncan	Jackson	90.00	
	20	TATE	Bernard Cedric	Tate	111.33	
	21	GILES	Harrison Relf	Giles	91.34	
	22	WATSON	Judy May	Watson	157.33	
					Exit	

Load Long Service Leave Year-To-Date accrual

- **3** In the **Year to Date** field, enter the *year-to-date accrual* for each employee.
- 4 Click on the Exit button.
- 5 Click on the Exit button or press Esc.

Other options

If the Annual Leave Group assigned to the employee includes a Leave Loading rate, the option *Entitled to Leave Loading at x.xx%* will automatically be selected, with the Leave Loading rate from the Annual Leave Group shown.



If the option *Entitled to Leave Loading* is selected, an Annual Leave Group with a Leave Loading Rate **must** be assigned to the employee.

The **Days of sick leave without a medical certificate** field shows the number of days Sick Leave the employee has had in their current entitlement year without providing a medical certificate.

Other

Click on the **Other** tab if this screen is not active.

Employee Maintenance Employee Details Leave Entitlements Other U	Jser Defined	Notes	Standard Pay
Employee: 1 Wallace, Edward James	Password: E	DWARD	_
Rostered Days Off Track RDO's for this employee Accrue 0.0000 hours for each hour worked Cap accrual to 40.00 hours per pay Value hours at an average Available hours 0.00	Time in Lieu Time in Lieu Ho Other Pay rounding c Rapid Emplo	ours: carried forv oyee ind Attenda	0.00 ward: 0.00
Prev : F7 🗪 Next : F8 🔍 Find : F9 🕞 San	ve : F10 Delet	te : F6	Exit:Esc

Employee Maintenance - Other

Email

You can record e-mail addresses for your employees. If you are going to e-mail payslips to your employees, you must complete the following fields:

- 1 In the **Email address** field, enter the e-mail address where the employee's payslip should be sent.
- 2 In the **Password** field, enter the password with which their payslip will be encrypted.



If you have purchased EXO MyStaffInfo, the employee's e-mail address and password will be their login for the MyStaffInfo website.

Rostered Days Off

To set up an employee's Rostered Days Off:

- 1 Click on the option Track RDO's for this employee.
- 2 Enter the following Details:

Field	Description
Accrue x hours for each hour worked	Enter the rate at which the employee accrues RDO's.
Cap accrual to x hours per pay	Enter the maximum number of hours the employee accrues RDO's on per pay period.
Value hours at x pay rate	 From the dropdown list select: An average to value RDO's at an average rate, or Rate X to value the RDO's at a specified hourly rate. This value will be used for both the accrual and payment of RDO's.
Available hours	This field displays the employee's RDO's balance.

To enter balances for Rostered Days Off

1 In the **Available hours** field, enter the employee's balance up to the last pay.

Time in Lieu

This field is used for recording time in lieu the employee has accrued.

To enter balances for Lieu Time

- 1 Click on the Other tab.
- 2 In the Time in Lieu Hours field, enter the employee's balance up to the last pay.

Pay rounding carried foward

If you have set up the system to apply rounding to an employee's pays, each time an employee's net pay is rounded, the system will accumulate the rounded-off cents in this field. Once the minimum payout value is reached, this accumulated value will be autmatically be paid to the employee in their next pay.

Rapid Employee

If you are using Rapid Load Pay and will enter this employee's pay using Rapid Load Pay, select this option.

Time and Attendance Employee

If you have EXO Time and Attendance and will record the employee's time and attendance information using EXO Time and Attendance, select this option.

User Defined

Employee Maintenance		_
Employee Details Leave Entitlements	Other User Defined	Notes Standard Pay
Employee: 1 Wallace, Edwa	ard James	
User Defined Fields	User Defined	11
🗖 User Defined	User Defined	11
User Defined		
User Defined		
User Defined		
User Defined	0.00	
User Defined		
		-
🔶 Prev : F7 🛛 🔿 Next : F8 🛛 🔍	Find : F9	Delete : F6 💽 💽 Exit : Esc

Click on the User Defined tab, if it is not currently active.

Employee Maintenance - User Defined

User Defined Fields

This area contains user definable fields that can be used to record additional information on your employees.

To rename a User Defined Field

1 Double-click on the User Defined caption of the field you want to use.

User Defined

Employee Maintenance - User Defined - Renaming Using Defined Field

- 2 Enter a title for this field.
- 3 Press Enter.

To reset the User Defined Field

1 Double-click on the title of the field.

- **2** Delete the title.
- 3 Press Enter.
- 4 The following user definable fields are available:

Field	Description
2 x Check boxes	Used for yes/no options.
2 x Dates	Used to record a date.
3 x Text Fields	Used to enter short text descriptions.
1 x Number Field	Used to enter a value.
1 x Comment Field	Used to enter comments.

Notes

Employee	:	1	Wallace, Edward James]	
Date	Туре	Entered By	Note		Remind Me	
18/05/2011	н		Annual Leave Entitlement changed from 160 Hours to 160 Hours on 18 May 2011	*	11	
				-		
18/05/2011	Ĥ		Annual Leave Entitlement changed from 160 Hours to 160 Hours on 18 May 2011		11	
				-		
18/05/2011	н		Annual Leave Entitlement changed from 160 Hours to 160 Hours on 18 May 2011		11	
				-		-
18/03/2011	H		Annual Leave Entitlement changed from 160 Hours to 160 Hours on 17 May 2007		11	
				-		
17/03/2011	н		Annual Leave Entitlement changed from 160 Hours to 160 Hours on 16 May 2007	*	11	
				-		-
		_ - м.	14.50 State 50 Constant		E rater	1

Click on the Notes tab if this screen is not active.

Employee Maintenance - Notes

This screen shows all the notes that have been entered against an employee.

Every time an employee is paid leave, their leave entitlements are changed or their Hourly Rate/Salary is altered, the system automatically generates a note, which is stored in this area.

To Edit an exiting Note:

1 Double-click on the note you want to edit.

To Add a new Note:

1 Click on the Add button or press F4.

Note		83
Date: 18/05/2011 Entered By: A Note type:	Reminder Date: ///	
	<u>_</u>]
	<u>.</u>	
Save : 1	F10 Delete : F6 Exit : Esc	

Employee Maintenance - Notes - Adding a Note

2 Enter the following details:

Field	Description
Date	This is the date on which the note is added.
Entered By	This field default to the User Code of the user adding this note.
Note Type	From the dropdown list, select the type of note you are adding.
Reminder Date	If you want the system to remind you of this note, enter the date on which you want to be reminded.
Recipients	Click on the button to select the Users that should be reminded.

- **3** In the space provided, enter your note.
- 4 Click on the Save button or press F10 to save the note.

Standard Pay

Click on the Standard Pay tab if this screen is not active.

This area stores the employee's pay template; what they are normally paid each pay period.

Employee Maintenance						
Employee Details	Leave Entitlements	Other	User Defined	Notes	Standard Pay	
Employee:	1 Wallace, Edwar	d James				
<u>W</u> ages						
Allowances	Wages		25.0000	100	0.00	
Hourly <u>R</u> ates	Salary:				0.00	
<u>S</u> alary	Allowar	ice Taxable		0.00		
Deductions	Deduct	on Pre-Tax:		20	0.00	
Non-Cash Benefi	ts Leave:	Leave:			0.00	
Superannuation	n Gross Taxable:			800).00	
Leave Manageme	PAYG:		Override	11	9.00	
Costing	Allowar	ice Non-Tax			0.00	
	Deduct	ion Post-Tax	p. 		8.00	
<u>EATG</u>	Roundi	ng:			0.00	
How Paid	Net Pa	ı y :		673	3.00	
Hours Paid	└					
Default Payslip <u>N</u> o	ote Hours Paid	: 40.00				
🔶 Prev : F7	📥 Next : F8 📃 🔍 F	nd : F9	Save : F10	Reset	💽 Exit : Esc	

Employee Maintenance - Standard Pay

I M P O R T A N T —



If changes are made to the employee's Standard Pay after a Current or One-Off Pay is created, the pay will not automatically be updated with the changes.

Hourly Rate

To enter an Hourly Rate

1 Click on the Hourly Rates button.

Hourly Wage Rates	🗴 📕 Hourly Wage Rates	83
Rate 1 25.0000 Rate 2 0.0000 Rate 3 0.0000 Rate 4 0.0000 Rate 5 0.0000 Rate 6 0.0000 Rate 7 0.0000 Rate 8 0.0000 Rate 9 0.0000	Rate 1 25.0000	
Save : F10		

Standard Pay - Hoursly Rates

2 Enter the employees Hourly Rate. If you have the option for **Multiple Wage Hourly Rates** turned on, you will be able to enter up to 9 Hourly Rates for each employee.

ΝΟΤΕ



You can change the description(s) of the Hourly Rate(s) from the **Hourly Rates**. Refer to your EXO Payroll user guide for more information.

3 Click on the Save button or press F10.

Wages

To add Standard Pay Wages

1 Click on the Wages button.

Wages			Allowances				
Employee: 1		Wallace, Edward James					
Hours	Rate	Amount	Pay Rate Desc	ription	Code	Cost Centre	Cost Centre Name
40.00	25.0000	1000.00	Ordinary	-	1	2210	NSW/Accounts/Wages
0.00	25.0000		Time & Half	-	1	2210	NSW/Accounts/Wages
0.00	25.0000		Double Time	•	1	2210	NSW/Accounts/Wages
		0			-		
				-			
Total Ho	urs :	40.00					

Standard Pay - Wages

2 In the line corresponding with **Ordinary**, enter the standard hours the employee is paid in each pay period.



If there are no lines in the employee's Wages screen, click on the **Add** button or press **F4** to add a new line.

Wage Rate Type:	Ordinary
Hourly Rate Code:	1 - Rate 1
Hourly Rate:	25.0000
Number Hours:	40.00
Amount:	1000.00
Cost Centre:	2210 NSW/Accounts/Wages
Alternative Type Desc:	Direct cost to this code
	Save : F10 Exit : Esc

3 Alternatively, you can click on the corresponding line and click on Edit or press F5.

Standard Pay - Edit Wages

- 4 From the Wage Rate Type field, select Ordinary.
- 5 The **Hourly Rate** field shows the rate at which hours against this pay rate multiplier will be paid.
- 6 If the employee has multiple hourly rates, enter the appropriate *Hourly Rate Code* in the Hourly Rate Code field.
- 7 In the **Number Hours** field, enter the standard number of hours the employee is paid in a pay period.

I M P O R T A N T –



If the employee is entitled to Rostered Days Off, the value entered into the **Number Hours** field reflect the number of hours *worked* not *paid*.

- 8 If you want to cost the hours to a specific Cost Centre, enter the appropirate *Cost Centre Code* in Cost Centre field.
- **9** In the **Alternative Type Desciption** field you can enter an alternative description for this pay rate multiplier.

10 Click on the Save button or press F10 to save from this screen.

11 Click on the Save button or press F10 to save the employee's Standard Pay Wages.

Allowances

To add Standard Pay Allowances

1 Click on the Allowances button.

Wage								6
	Wages					Allowa	ances	
E	Employee: 1 Wallace, Edward James							
Code	Allowance	Units	Pay Rate	Amount	Туре	Costcentre	Cost Centre Description	*
1	Bonus					2030	NSW/BONUS	
								Ī
								Ì
								†
								1
								+
								+
								ł
		12						+
20						<u></u>		-
						· · · ·		-
								Ŧ
🔶 Pre	v : F7 🛛 🔿 Next : F8	🛉 📥 Ad	d: F4 🛛 😭	Edit : F5	Save	e : F10 🗔	Delete : F6 💽 Exit : f	Esc

Standard Pay - Allowances

2 Click on the Add button or press F4.

Allowances		23
Allowance Code:	1 Bonus	
Calculation Method:	Fixed Dollar Amount 🖃	
Units:	0.00	
Rate:	0.0000	
Amount	0.00	
Rate Type:	Periods to tax over: 0	
Wage Rate Code:	Γ	
Cost Centre:	2030 NSW/BONUS	
Find : F	9 Save: F10 🕞 Exit: Esc	

Standard Pay - Allowances - Add Allowance

3 Enter the following information:

Field	Description
Code	Enter the code for the Allowance you want to add. Note: You can click on the Find button or press F9 to get a list of your Allowances.
Allowance Name	This field displays the name of the Allowance. Note: If you have selected the option Can Modify Name in the Allowance Setup , you can change the name here.
Units	Enter the number of Units to pay against this Allowance.
Rate	Enter the rate at which the Units should be paid.
Amount	Enter the Amount of this Allowance.
Rate Type	Enter the Pay Rate Multiplier used for this Allowance.
Periods to Tax Over	If the Allowance Type is set to Bonus , enter the number of periods the Bonus should be taxed over. Note: You would normally only enter a value in this field when you pay this Allowance to the employee in the Current Pay.
Wage Rate Code	Enter the Wage Rate Code of the Hourly Rate at which this Allowance should be paid.
Cost Centre	Enter the Cost Centre to which this Allowance should be costed.

NOTE —

The availability of these fields are determined by the setup of the Allowance.

- 4 Click on the Save button or press F10.
- 5 Click on the **Save** button or press **F10** to save the employee's Standard Pay Allowances.

Salary

To add a Standard Pay Salary

1 Click on the Salary button.

Employee Salary	
Annual Salary:	78000.00
Weekly Salary:	1500.00
Hourly Rate:	37.5000
Save : F10	Exit : Esc

Standard Pay - Salary

2 Enter the employee's **Annual Salary**. The system will automatically calculate the Salary per pay period and the Hourly Rate.

NOTE —



Once the salary per pay period is calculated, the system may adjust the Annual Salary to reflect the actual annual value paid to the employee.

3 Click on the Save button or press F10 to save the employee's Standard Pay Salary.

Deductions

To add Standard Pay Deductions

1 Click on the **Deductions** button.

Code	Deduction Name	Usual Amt	Actual Amt	Bank	Branch	Account	Bank Ref	Balance
4	Child Support	3.00	3.00					
6	Union Fees	5.00	5.00					

Standard Pay - Deductions

2 Click on the Add button or press F4.

Deductions	
Deduction Code: 4 Child Support Rate: 0.0000 Amount: 3.00	
Reducing Balance: Protected Earnings Amount: Cost Centre: 2050 NSW/CHILD SUPPORT	-
Direct Credit BSB Number Account 000 - 000 00000000 (0 if not paid by DC) Reference:	
Find : F9 Find : F10 Exit : Esc	

Standard Pay - Deductions - Add Deduction

3 Enter the following information:

Field	Description
Deduction Code	Enter the code of the Deduction you want to add. Note: You can also click on the Find button or press F9 to get a list of your Deductions.
Rate	Enter the Rate at which this Deduction is made.
Amount	Enter the Amount of this Deduction.
Reducing Balance	If the Deduction Type is set to Reducing Balance , enter the remaining balance of this Deduction.
Protected Earnings Amount	If the Deduction Type is set to Child Support , this field will show the protected earnings.
Cost Centre	This field will default to the employee's Default Cost Centre. To have the deduction costed to a specific Cost Centre, enter the appropriate <i>code</i> in this field.
BSB Number, Account	Enter the bank account details for this Deduction.
Reference	Enter the Reference for the bank account.

NOTE _____



The availability of these fields are determined by the setup of the Deduction.

- 4 Click on the Save button or press F10.
- 5 Click on the **Save** button or press **F10** to save the employee's Standard Pay Deductions.

Superannuation

To add Standard Pay Superannuation Contributions

1 Click on the **Superannuation** button.

3	Wallace Private Supe	200.00			
3		200.00		2040	NSW/EMPLOYEE SUPER
	Wallace Private Supe	135.00	9.0000	2041	NSW/EMPLOYER SUPER

Standard Pay - Superannuations

- 2 Click on the Add button or press F4.
- **3** A list of your Superannuation Calculations will appear. Double-click on the Contribution you want to add.

Superannuation Edit	8
Employee: 1	Wallace, Edward James
Name:	Wallace Private Supe
Calculation Method:	% of Gross Pay 💌
Superannuation Type:	Employer Superannuation
Superannuation Provider:	Wallace Private Insurance 🔄
Contribution Type:	SG
Percentage Rate:	9.0000
Amount:	135.00
Fund Number:	
Cost Centre:	2041 NSW/EMPLOYER SUPER
Sind	: F9 Exit : Esc

Standard Pay - Superannuations - Add Superannuation Contribution

- 4 In the **Percentage Rate** field, enter the rate at which the superannuation should be calculated.
- 5 In the Amount field, enter the amount of the superannuation contribution.
- 6 In the **Fund Number** field, enter the employee's superannuation fund membership number.
- 7 In the **Cost Centre** field, enter the Costs Centre this Superannuation Contribution should be costed to.
- 8 Click on the Save button or press F10.

ΝΟΤΕ



The availability of these fields are determined by the setup of the Superannuation Contribution.

9 Click on the Exit button or press Esc to return to the employee's Standard Pay.

How Paid

To set up Standard Pay Payment Methods

1 Click on the How Paid button.

How Paid	23
1 Wallace, Edward James	
Direct Credit: C No C Yes Add/Edit Direct Credits	
Direct Credit Amount: 943.00 Balance Paid	
Pay Cash: • No • Yes • Balance	
Cash Amount: Actual:	
Pay Cheque: No O Yes O Balance	
Cheque Amount: Actual:	
Cash Analysis:	
5c 10c 20c 50c \$1 \$2 \$5 \$10 \$20 \$50 \$100	
Coverride Rounding Rounding: 0.00	
Save : F10 Exit : Esc	

Standard Pay - How Paid

To set up Standard Pay Direct Credit information

1 Click on the Yes option for Direct Credit.

2 Click on the Add/Edit Direct Credits button.

Direct Credits o	f Pay	5	83
Usual Amount 943.00]	Actual Amount 943.001	Reference Pri Bal BSB Number Account]
		·	1
	Add :	F4 Edit : F5 Seve : F10	

Standard Pay - How Paid - Direct Credits

3 Click on the Add button or press F4.

Direct Credit	83
BSB Number Account - 738 000093290 Reference:	
Priority: 1 Pay Balance Of Pay 🔻	
Required Amount: 943.00	
Exit : Esc	

Standard Pay - How Paid - Direct Credits Setup

4 Enter the following information:

Field	Description
BSB Number, Account	Enter the employee's bank account.
Reference	Enter the reference that should appear on the employee's bank statement.
Priority	Set the priority order for this bank transfer.

Fixed Dollar Amount, Pay Balance of Pay, Allow Part Payment	Select the type of transfer for this account. Use Fixed Dollar Amount for a set amount that has to be transfered every pay. Use Allow Part Payment for transfers if there is sufficient funds. Use Pay Balance of Pay for any remaining money to be transfered. Note: At leasts one of the bank accounts must be set to Pay Balance of Pay .
Required Amount	Enter the amount to be transfered to bank accounts set to Fixed Dollar Amount or Allow Part Payment .

- 5 Click on the Save button or press F10.
- 6 Click on the Save button or press F10 to return to the employee's How Paid.

To set up Standard Pay Cash Payment information

- 1 Click on the Yes option to pay a fixed amount in cash.
- 2 Enter the amount in the Cash Amount field.
- 3 Click on the **Balance** option to pay the balance of the employee's pay in Cash.

To set up Standard Pay Cheque Payment information

- 1 Click on the **Yes** option to pay a fixed amount by cheque.
- 2 Enter the amount in the Cheque Amount field.
- 3 Click on the **Balance** option to pay the balance of the employee's pay by cheque.

NOTE -



If you make any payments by Cash, the **Cash Analysis** area will show you the breakdown of denominations required to pay the employee.

NOTE —

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If you are applying any rounding to the employee's Net Pay, the **Rounding** field will show the value that is rounded from the employee's Net Pay.

Hours Paid

To set up Standard Pay Hours Paid for a Salaried Employee

1 Click on the Hours Paid button.

Hours Paid	83
Hours Paid For Leave Calculations:	
Affects how an employee's leave is valued and would not normally be changed, unless the employee was not going to be paid in the next pay period.	
The ∨alue entered here should be equal to one or more full pay periods:	
The total number of hours paid 40.00	
Exit : Esc	

Standard Pay - Hours Paid

- 2 In the **The total number of hours paid** field, enter the employee's standard number of hours paid.
- IMPORTANT-



The value you enter in this field **must** be equal to the number of hours entered in the **Hours per Pay Period** field in the **Employee Details** screen.

3 Click on the Save button or press F10 to save the employee's Standard Pay Hours Paid.

Click on the **Save** button or press **F10** to save the employee's Standard Pay Payment Setup.

Default Payslip Note

To add a Standard Pay Default Payslip Note

1 Click on the **Default Payslip Note** button.

Payslip Not	e	83
Note Type:	PN	
		-
	Exit : Esc	

Standard Pay - Payslip Note

2 In the space provided enter the default note to appear on the employee's payslip.

This default note can be changed when processing a pay. Any changes to this note will only be applicable to that pay.

3 Click on the Save button or press F10 to save the employee's Default Payslip Note.



Skills checklist

Tick the skills that you have learned in this unit.

Skills	 ✓
Add a new employee	
Set up Leave Entitlements	
Set up Rostered Days Off Entitlements	
Record employee's e-mail address	
Add an employee note	
Set up the employee's Standard Pay information	

2

Appendices

This unit contains a number of appendices for further study:

Appendix 1: Migrating employee data from MYOB AccoungRight Premier/MYOB PowerPay

Appendix 1: Migrating employee data

If your previous payroll system was MYOB AccountRight or MYOB PowerPay, you can migrate your employees' basic information to EXO Payroll using the **Migration Wizard** available in EXO Payroll.

In order to be migrated using the Migration Wizard, data must be exported from the source payroll system in comma-separated format.

To export data from MYOB AccountRight

1 Select Export Data > Cards > Employees from the File menu. This opens the Export File window.

Export File Format:	Comma-separated			
First Record is:	Header Record	-		
Identifiers:			_	
Postcode:				
Custom List #1:	[
Custom List #2:				
Custom List #3:				

- 2 Select Comma-separated for the Export File Format.
- 3 Select Header Record for the First Record.
- **4** Use the fields on the bottom half of the window to specify which employees you want to export.

5 Click Continue.

Export Fields		MYOB Premier Fields	Export Order	
Co./Last Name:	-	^ Co./Last Name:	Field 1	
First Name:	_	First Name:	Field 2	1
Card ID:		^ Card ID:	Field 3	-
Card Status		Card Status:	Field A	
Cummey Code:		Currency Code:	Field 5	
Addr 1 - Line 1:		Addr 1 - Line 1:	Field 6	
·Line 2·		- Line 2:	Field 7	
·Line 3		- Line 3:	Field S	
· Line d.	-	· Line 4:	Field 9	
(^=0	(* = Re Conditional Field: I Cano	equired Field for an MYOB Premier Imp Must have one or more fields for an M cel <u>U</u> nmatch All	vort) YOB Premier Import) Match All <u>E</u> xp	ort

- 6 On the Export Data window, click Match All.
- 7 Click Export.
- 8 Enter a *name* for the export file.
- 9 Click Save.

To export data from MYOB PowerPay:

1 Select Export Data... from the File menu. This opens the Export Parameters window.

Export Parameters			E
	Export Iten	าร	
Type of Ex	port: Employees]
Export File For	mat: O Tab-delimited	© Comma-	separated
First Recor	d is: © Header Recor	d O Data Re	cord
	Current Emplo	yees Only	
All From Er	nployee Code: BART		Search
To Employee Code: WALL			Same
Year To Date	From Date: 00/00/0	0	
	To Date: 00/00/0	0	
Cancel			Continue

- 2 Select *Employees* for the Type of Export.
- 3 Select Tab Delimited for the Export File Format.
- 4 Select Header Record for the First Record.
- **5** Use the fields on the bottom half of the window to specify which employees you want to export.

6 Click Continue.

Click the F	ields	in the order that you wish to exp	port them.
Export Fields		List Of Fields	Export Order
* Employee Code	-	* Employee Code	Field 1
Last Name		Last Name	Field 2
First Names		First Names	Field 3
Address1		Address1	Field 4
Address2		Address2	Field 5
Suburb		Suburb	Field 6
State		State	Field 7
Post Code		Post Code	Field 8
Country		Country	Field 9
Date of Birth	-	Date of Birth	Field 10
	[* :	Bequired Field for an Import)	

- 7 On the Export Employees window, click *Match All*.
- 8 Click Continue.
- 9 Enter a *name* for the export file.
- 10 Click Save.
- 11 Open the file in Microsoft Excel.
- 12 Save the file in Comma Separated Values (CSV) format.

To migrate the exported information to EXO Payroll

1 From the Help menu, select Migration Tool. The following window is displayed:

Migration Wizard	
EXO EMPLOYER SERVICES	Welcome to the EXO Payroll Migration Wizard
WHOSE BITE PARTS SOLUTIONS	This wizard will guide you through the process of migrating the data from your existing MYOB Premier or PowerPay into an EXO Payroll database.
	Click Next to continue, or Cancel to exit the wizard.
MYOB	Next Cancel

Migration Wizard

2 Click Next on the Welcome screen.

- 3 Click **Browse** to specify the location of the CSV file exported from PowerPay/Premier.
- 4 Click Next.
- 5 If you are migrating data from MYOB PowerPay, you must map the PowerPay Pay Frequencies in the export file to PayrollEnterprise Pay Frequencies. For each frequency Code listed, select a Pay Frequency (Weekly, Fortnightly, Bi-monthly, 4 weekly or Monthly).
- 6 Click Next once all Pay Frequencies have been mapped.
- 7 At this point you must back up your company file before proceeding.
- **8** Once the backup is completed, the Migration Tool will check that it can read the CSV file successfully.
- 9 Once the file has passed all the checks, click **Next** to continue.
- 10 Select the option I accept full responsibility
- 11 Click Migrate to begin the migration operation.
- 12 The progress of the migration is displayed.
- **13** Once the migration is complete, the results of the migration are displayed. Click **Print** to print a copy of the migration log.

NOTE -

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_	(=)	1

If any fatal errors were encountered, exit the Migration Tool and correct the problems that caused them.

14 Click Next to continue.

15 Click Finish.

Your employees' basic information will now migrated to EXO Payroll. You can now complete the setup of additional information, e.g. Standard Pay information.

Employee Maintenance