



Smartly

Powering your people

myob
EXO

Onboarding guide

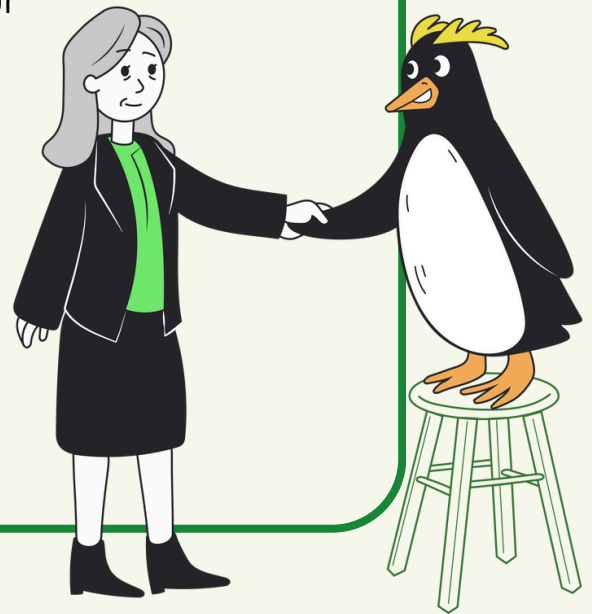
Switching to **Smartly**

Did you know Smartly can manage your implementation for you?

With Smartly's Managed Implementation service, we format and input all of your relevant payroll information and employee data on your behalf.

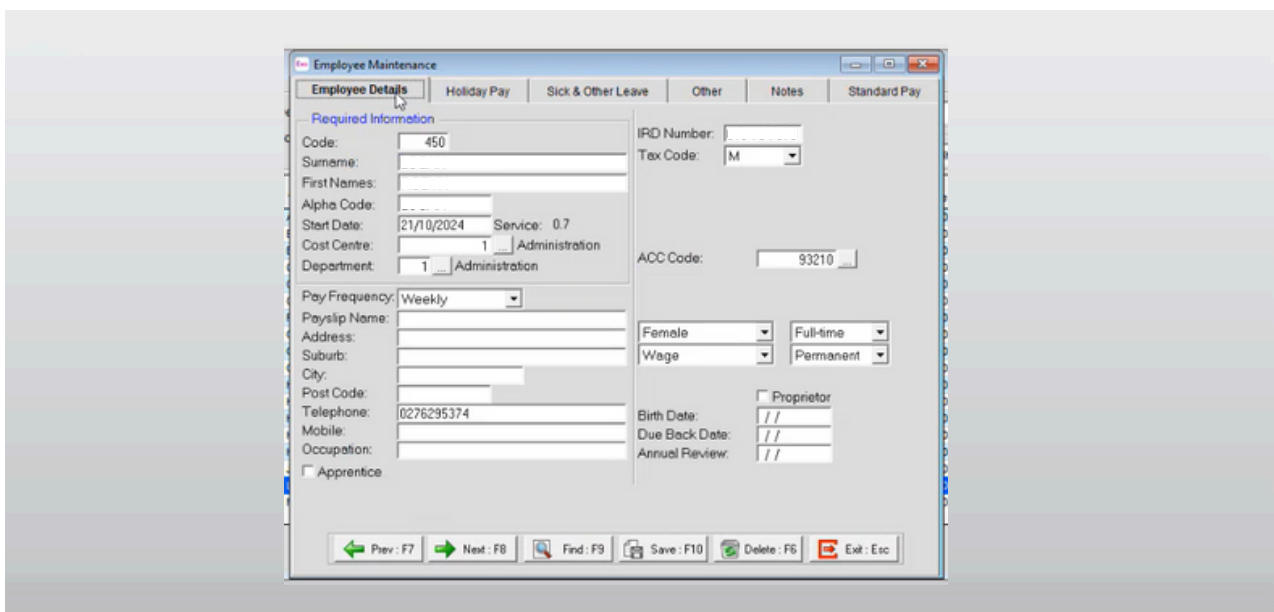
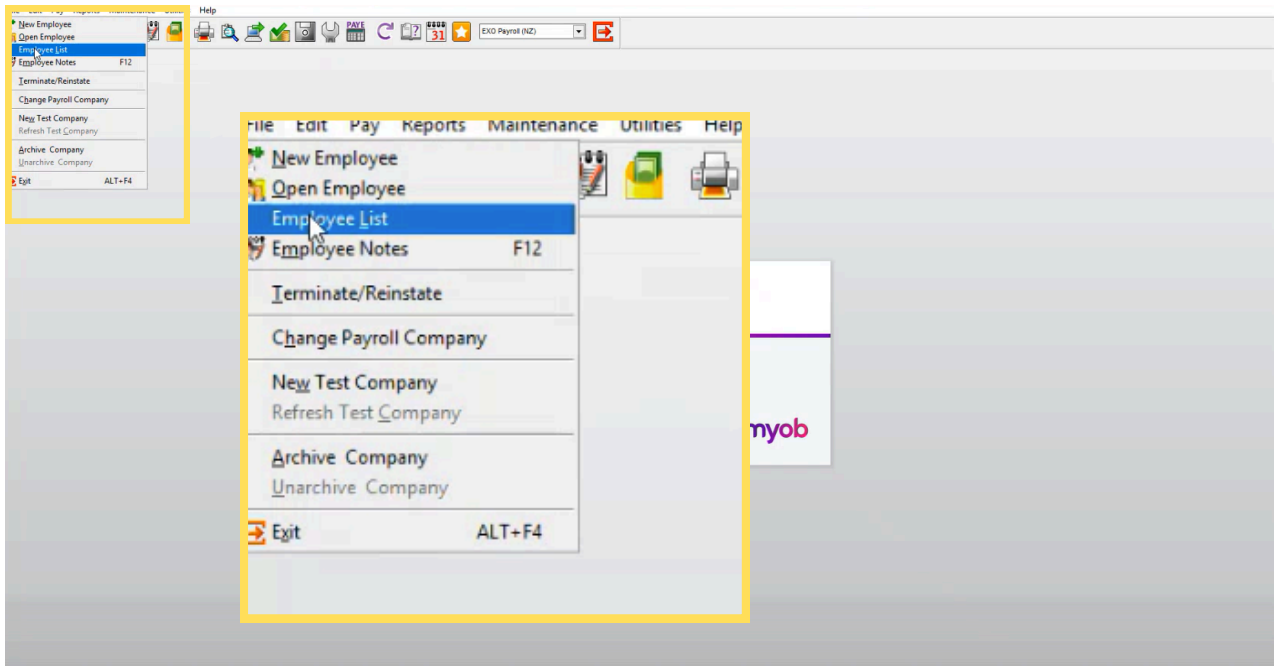
- Your dedicated Relationship Manager runs your onboarding process, with priority support throughout.
- We help you export your payroll data from Xero.
- We format your data and directly upload your payroll information into Smartly.
- We configure your site settings for you, including any relevant integrations i.e. Xero.
- Unlimited training sessions.

Reach out to your Relationship Manager to find out more!



Employee Details

You can copy and paste your employee details directly from your MYOB Exo software into your Smartly site. To find your employee details go to File > Employees. Once an employee is selected navigate between the tabs to transfer all information across.

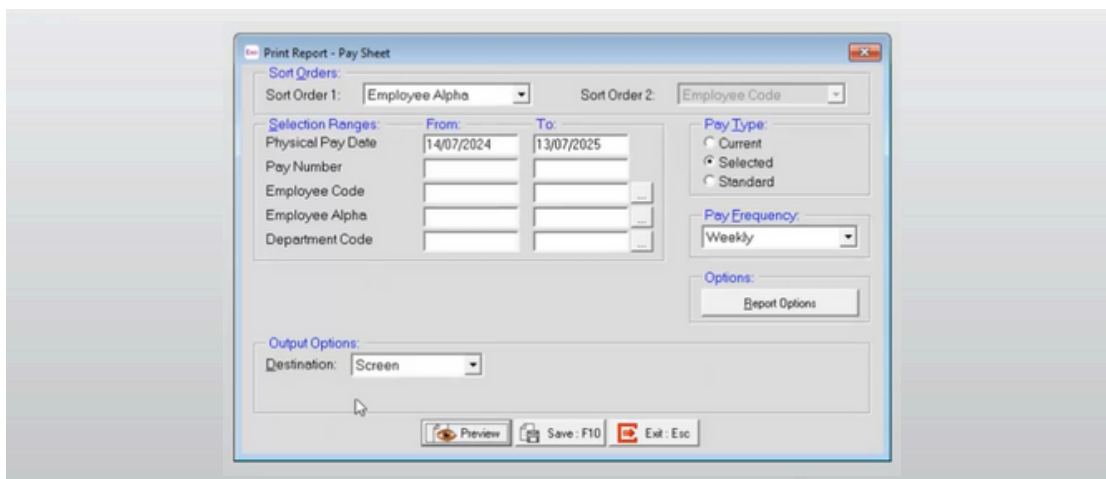
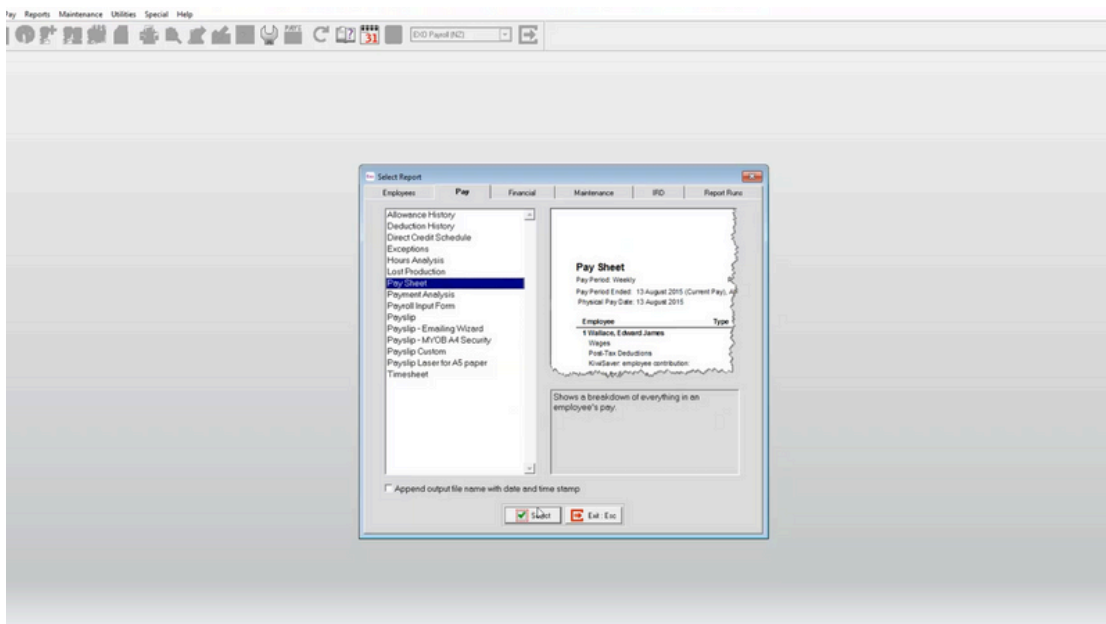


If your employees have any allowances or deductions to set up you can find these in the **Allowances Report** under **Reports > Pay > Allowance History**. Please provide these to your Relationship Manager for loading (in Excel format).

Historic Leave Earnings

To maintain compliance with the Holidays Act, we need 53 weeks of earnings data for each employee to enable Smartly to accurately calculate leave payments, we will require you to complete our Historic Earnings template which was sent to you by Smartly.

You can use the **Pay Sheet** report found under **Reports > Pay > Pay Sheet** to complete this information. Your Relationship Manager will provide a date range for this report, and it will also be in the Historic Earnings Template.



NOTE: Days Paid may not show in this report, depending on your setup. This information will need to be added manually into the spreadsheet.

Please reach out to your Relationship Manager if you have any questions on completing the Historic Earnings template.

Here is an example of the template provided by your Customer Relationship Manager. Please input each employee's pay details from the reports extracted from MYOB Exo.

Note: in the first tab on the spreadsheet there are some examples of how to complete it.

Employee Name	PPE Date	Gross Earnings	Ordinary Pay	Total Hours Paid	Days Paid
ayroll	12/05/2024	2000	2000	80	
ayroll	28/04/2024	2000	2000	80	
ayroll	14/04/2024	1250	1250	50	
ayroll	31/03/2024	1500	1500	60	
ayroll	17/03/2024	2000	2000	80	
Employee Name	PPE Date	Gross Taxable Earnings	Ordinary Pay	Total Hours Paid	Days Paid
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					

Leave Reports

After processing your last pay in MYOB Exo, please send us the following two leave reports so we can load your employees' opening leave balances into Smartly.

- Leave Balances Report
- Holiday Pay Report
- Copy of last payslip

When running each report, select the last pay period end date before transitioning to Smartly,