# goPayroll QuickStart

## Welcome to SmoothPay's online payroll - goPayroll

Thanks for choosing GoPayroll as your payroll solution!

This overview should be read thoroughly (*though we can't MAKE you do that*) before you start paying your staff with goPayroll. If you'd rather skip ahead, just go to the last page of this document.

If you get stuck at any point, review this document or contact the help desk for assistance. We're always happy to help if we can - just ask.

We provide comprehensive support and constant updates that improve your payroll processing experience, so if you have any problems at all then please feel free to contact our help desk for assistance, by phone or email.

## Setting up an account

If you're *new to SmoothPay* then try out the demo database (*and read this short guide so you have a fair idea of how it hangs together*), then select a subscription option from the [goPayroll portal](#) and enjoy a complimentary 30-day trial. Call or email our friendly helpdesk and we'll get you sorted with advice on:

- migration assistance from existing payroll systems
- free training and product support

If you're *transitioning from an existing SmoothPay desktop payroll* simply create a fresh backup of your data to our online backup service and contact the HelpDesk. Your database will be transferred online and you'll be sent your initial login credentials. Charges commence on expiry of your current subscription (*you then need to complete the appropriate subscription and you'll receive an additional 30 days free*). **Re-migration will incur a service charge**.

## What's so great about online payroll?

Online payroll means you can access and process payroll anywhere you have a computer with internet access.

It also means no more software updates, no more firewall and security issues hampering your payroll operation, and automatic multi-user access.

The other great thing about goPayroll is that it provides almost all of the functionality you'll find in SmoothPay Gold desktop payroll (*which happens to use the exact same database too, giving you a choice of platform*). The main things that are available in SmoothPay Gold, but absent in goPayroll, are: Access Control Management (*apart from basic read-only access for additional users*), the Savings & Loans module and some of the direct-integration options for network-connected timeclocks. However, the new reporting engine is far superior to the old desktop edition.

*Sorry, goPayroll is NOT designed for tablets or mobile phones*

## Your security!

Security is a critical aspect of any online system, particularly payroll

☀ We do not store your username or password on our authentication servers! All credentials are stored as SHA-256 hash encrypted data.

☀ Your data is available to you forever - you can download any backup archive of your complete database from the Tools..Restore page (*and, unlike most other online payroll systems, the downloaded database can also be used in the desktop edition SmoothPay Gold*).

☀ We do not generate device-level authentication cookies (*e.g. Remember me on this computer*) for your added security.

☀ Your data is stored safely in our data centre in Palmerston North, New Zealand and is accessed using SSL (HTTPS) encrypted connections to the host.

Unfortunately there is no cure for systems compromised by key-logger software, so if you believe your system has been compromised you must arrange for your credentials to be changed immediately.

Any database downloads are your responsibility for security - we do not advise downloading your data onto public-access computers.

## Migration assistance

SmoothPay can assist you with migrating data from spreadsheets and other payroll systems (*such as the numerous non-compliant NZ payroll systems, common Australian, PNG and Pacific Islands systems too*).

It sure saves a lot of time!

[Use this link to find out more and to arrange migration assistance](#).

# Finding your way around goPayroll

The first and most important thing you need to know is that goPayroll operates entirely within a single web-page! This means you don't need to use the page-back and page-forward options in your browser (*if you do you'll end up at the previous website you used*). To navigate, use the header menu controls provided in goPayroll.

## Dashboard
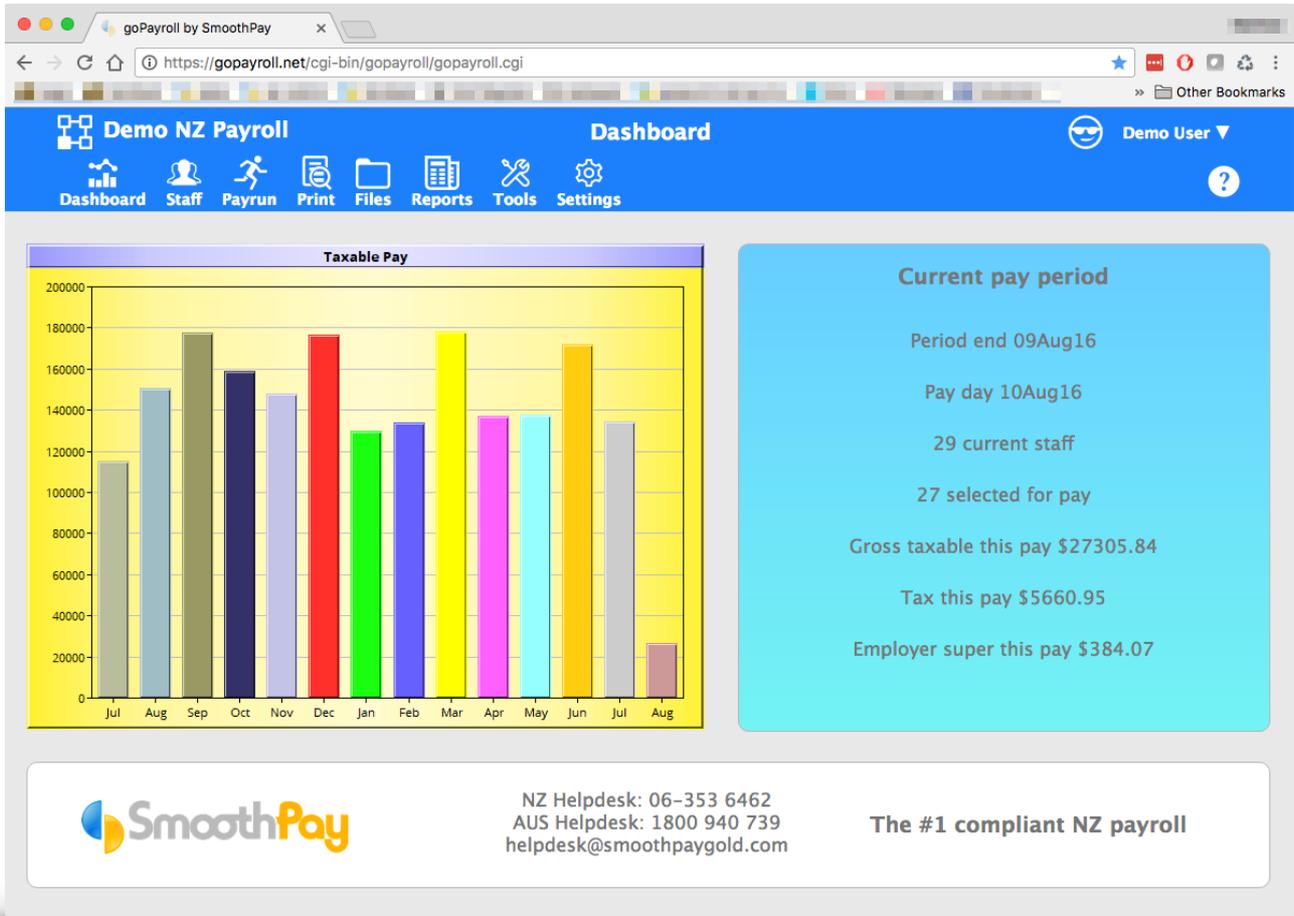


*The goPayroll Dashboard*

## Key to useful controls

| | |
|---|---|
|  | Access to any other goPayroll databases you might have |
|  | Quick access to the appropriate section of goPayroll |

## Staff page

This is where you manage your staff records and contract settings, review pay history, leave records etc.



*Staff page*

## Key to useful controls

| | |
|---|---|
| 🔍 | Quick find any employee by any part of their name, email address, phone number etc |
| Current staff ⬍ | Quick filter to display selected group of staff |
| ➕ ➖ 🖨 29 | Add record, Delete record, Print reports associated with the list, edit record (not shown in this shot), count of items in list |
| Personal Contract •••• | Quick access to these aspects of an employee's record |
| 🖊 | Edit record (or edit the part of the record that is currently displayed) |
| Right-click an employee's name | for access to leave balances and various tools for moving staff between payrolls |

## Adding new staff

When setting up a new employee it is particularly important that you check (*generally in this order*):

✳ Personal details

✳ Contract settings (*employment type, pay rate, department etc*)

✳ Bank account/s (*these are the employee's **personal** bank accounts - do NOT include third-party accounts here, use Agencies and Payments instead*)

✳ Pay history is automatically generated whenever a pay is processed, though if you're bringing on staff from another system you might need to add history entries to account for the tax year to date. In NZ you *must* capture 52 weeks history - our migration experts can often help you do this with minimal effort.

✳ Leave settings should already be correct for your country's rules and seldom need changing, though if you're bringing on staff from another system you might need to add leave history entries to reflect their leave balances.

✳ Superannuation (or KiwiSaver, SINPF, CINSF etc. depending on the country you're in)

✳ Recurring payments to other agencies (*e.g. government garnishee orders, rent, union fees, debt repayments etc.*) if any. The agencies to be paid must be added to the list of agencies and super funds in Settings..Payroll codes..Agencies. These payments remain in effect until you deactivate them, or in the case of diminishing balance payments when the balance reaches zero.

✳ Notes - entirely optional, but handy for things like copies of employee work visas, certificates, contract documents, warnings, reminders and so on.

✳ Tax - a fairly critical area to get right! goPayroll correctly implements rules for all supported countries (and in some cases where the rules are particularly poorly defined up to 3 different sets of rules)

## Payrun page

This is where all aspects of the payrun are accessed, from selecting who to pay, through to committing the payrun.



*The Payrun control centre*

**PLEASE NOTE: The Edit tool**  **must be used to change an entry**

The page is divided into the various control options available (*under the main menu bar*), and the input viewing and editing section for the various aspects of each employee's pay.

| Import | Menu of import functions available (*e.g. import timesheets from CSV file or an online attendance system or timeclock file*) |
|---|---|
| Who to pay | If you're not importing attendance data then this is where you select the staff to be paid in the current pay period (*the [+] tool also selects this option*) |
| | This is considered **Step 1** of your pay process and is usually followed by any adjustments required to the selected staff inputs. |

| | |
|---|---|
| Pay reports | This is where the standard pay reports can be produced for checking and where payslips can be emailed to all staff (*hopefully AFTER you have checked your reports!*).

All reports can be appended to a single PDF document for archival purposes or to send to someone else to check (by email etc) or to be printed in one job.

If you use accounting integration and have produced the Costing analysis report then your glcosting.txt file will have been created in your [Files] page.

All reports produced are also available from the [Print] page.

This is considered as **Step 2** of your normal pay process. |
| Process pays | This finalises the pay process by committing your pay inputs to each employee's history, accruing and consuming any leave, generating the direct credit file for the bank and preparing your payroll for the next pay period. The pay update reports are available in the [Print] page and any direct credit file

This is considered to be **Step 3** (the final stage) of the pay process. |
| Template | Stores the employee's current pay inputs (*Work, Allowances and any Overheads*) as their normal pay entries for subsequent payruns.

It saves time next pay! |
| Timesheet | Displays an easy-fill timesheet for your employee's ordinary time entries.

If you're using automatic overtime rules, or automatic TOIL/RDO rules then any excess hours captured will be automatically reassigned. |
| Payslip | Displays the employee's payslip as it currently stands |
| Summary | Displays the employee's summary for pay (*as it currently stands*) and provides for overriding tax (*you shouldn't do that!*), altering the number of pay periods, days paid and various other factors |
| Contract | Provides access to aspects of the employee's staff record (*so you don't have to go back to the Staff section to make minor alterations*) |
| Super | Provides access to the employee's super settings |
| Tax | Provides access to the employee's tax settings |
| Leave balances | Displays the employee's current leave balances (*you can also right-click the employee's name for a context menu*) |
| Instant pay | Instantly pay the employee (*handy if you have a contractor that wants to be paid immediately outside a normal payrun, or you have a termination payment to make, or an employee is going on leave and needs their pay processed early*)

**NOTE! Paying off-cycle pays for any other reason is NOT recommended (*esp. in NZ as it ruins the integrity of the Holidays Act calculation routines*)** |

# The Pay Process

## Three step pay process diagram (these steps are performed in the Payrun page)

### Step 1 - Pay inputs
Select all employees to be paid from the Who to Pay form and make any amendments as needed (*you can also import timesheet data from CSV, timeclock and selected web services*)

### Spotted an error?
*If you didn't pick up an error in the pays until after finishing the pay, then simply Restore (Tools..Restore) from the appropriate backup archive and make your corrections.*

*Repeat until everything is perfect*

### Step 2 - Pay reports
Print any set of standard pay reports, all payslips, costing analysis etc from the Pay Reports form - you can also email payslips in bulk from here

### Step 3 - Process pay
Completes the pay process, generates direct credit file, updates pay history and readies the system for the next pay period (*also automatically backs-up in case of mistakes*)

## SmoothPay's easy 3-step pay process

## We're here to help!

*Payroll can be very complex, but our payroll designers are experts, with years of practical experience, and can help with almost any payroll-related question.*

*SmoothPay provides "Direct-to-Desktop" support and training - you learn how to use SmoothPay more quickly in a one-on-one training environment - using your data, and on your computer.*

*We use a licensed and branded TeamViewer Quick Support tool to provide this service at no extra cost, both as part of your evaluation and as needed while your subscription remains current.*

***To contact our helpdesk*** *or request online training, just call the number shown at the foot of the goPayroll Dashboard, or use the email link (same place).*

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