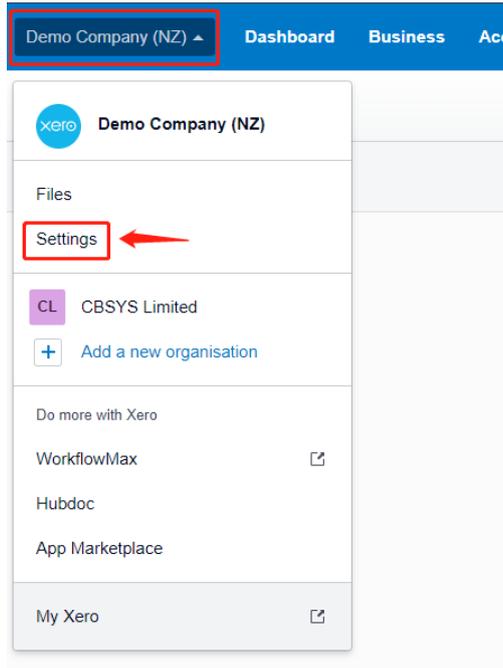


Xero Implementation Document

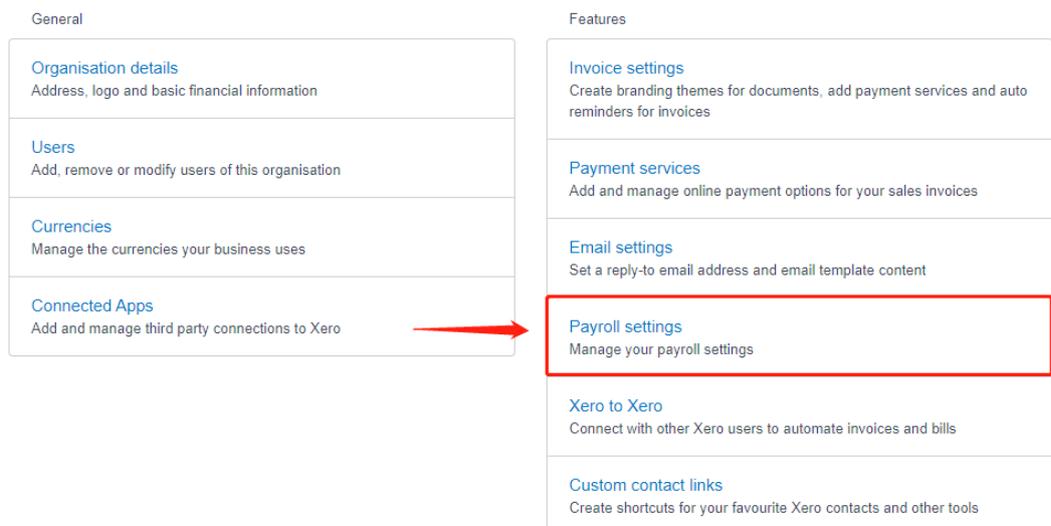
1. Xero Payroll Calendars Setup to match Clevertime Pay Group

In Xero, please check the payroll calendar's name, period type, and period start date:

- a) First of all, go to organization settings, then payroll settings. On the second bar of Calendars settings.



Organisation settings



[Looking for advanced settings?](#)

Payroll settings

Organisation **Calendars** Holidays Pay Items

Pay Calendars

Add

Name	Pay Period	Next Pay Period	Next Payment Date	
Monthly	Monthly	01 Aug 2019 - 31 Aug 2019	23 Aug 2019	⋮
Weekly - Default	Weekly	08 Jul 2019 - 14 Jul 2019	16 Jul 2019	⋮

- b) Make sure the pay calendar's name, pay period, and period start date is matching the pay group settings in CleverTime.

Payroll settings

Organisation Calendars

Pay Calendars

Name

Monthly

Weekly - Default

Edit Pay Calendar

Pay Period: Weekly

Name: Weekly

Next Pay Period: 08 Jul 2019 - 14 Jul 2019

Next Payment Date: 16 Jul 2019

Make this my default pay calendar for new employees

Your pay calendar will run weekly. It will start on 08 Jul 2019 and employees will be paid on 16 Jul 2019.

Cancel Update

Modify a pay group

* Name: Weekly

Pay Period: Weekly

Pay Period Started: 2019-07-08

WorkTime(hours): 5.5

* Break deduct: By Day

Max length of shift(hour): 10

Max Shift Gap(mins):

Penalty Time In(min): 1

Pay on finish day:

Leave options: Skip holiday Skip unscheduled By schedule

Calculate options: Skip Exception

Calculate Holiday: Enable Public Holiday Enable Alternative Holiday Enable Public Holiday Absent

Validators: Accept Early Arrival Accept Late Departure Manually Approve OT Accept Unscheduled Work Time Pairing By Punch

Memo:

Status: Active

Monthly Start Date: 1st of every month

Time Zone:

BreakTime(hours): 0.5

BreakTimeException(mins): 0

Penalty Time Out(min): 2

Convert Unit: 8 Hours/Per Day

Save

2. Xero Pay Items Setup to match Pay Types in CleverTime

In Xero, please check the Pay Items' name are the same as Clevertime Pay Types' name

a) On the fourth bar of Pay Items settings

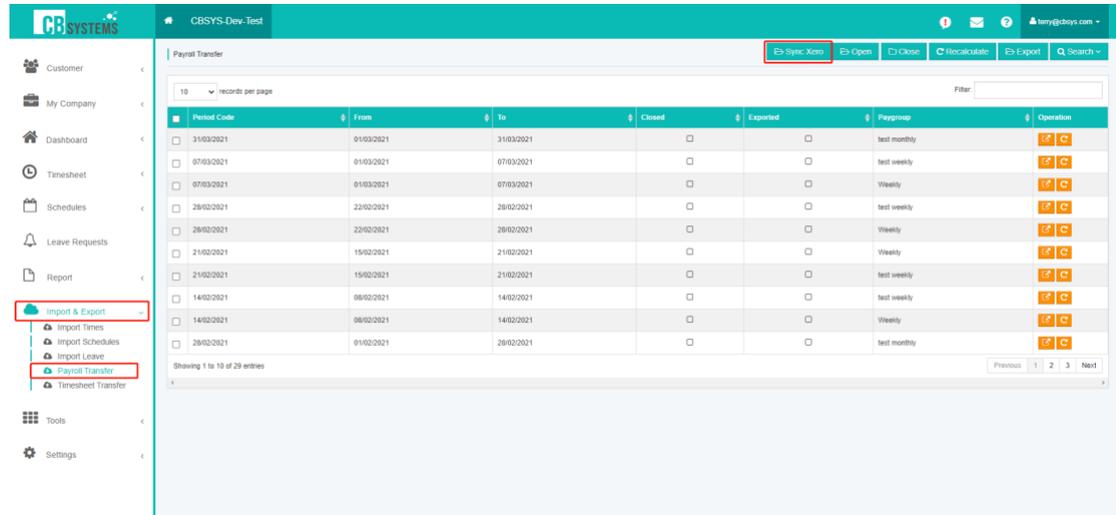
Organisation	Calendars	Holidays	Pay Items	
<div style="display: flex; justify-content: space-between;"> Earnings Add </div>				
<div style="display: flex; justify-content: space-between;"> Leave </div>				
<div style="display: flex; justify-content: space-between;"> Reimbursements </div>				
<div style="display: flex; justify-content: space-between;"> Deductions </div>				
<div style="display: flex; justify-content: space-between;"> Statutory Deductions </div>				
<div style="display: flex; justify-content: space-between;"> Superannuation </div>				
Earnings Name		Earnings Category	Rate	Account
ACC (First Week)		Other Gross Earnings	0.8x of employee's ordinary earnings rate	477: Salaries
Accommodation Allowance		Other Gross Earnings	\$200.00 per Unit	477: Salaries
Bonus		Discretionary Payments	Fixed Amount	477: Salaries
Directors Fees		Withholding Income	\$1,000.00 Fixed Amount	477: Salaries
Employee Share Scheme		Withholding Income	Fixed Amount	477: Salaries
First Aid Allowance		Other Gross Earnings	\$2.00 per Unit	477: Salaries
Holiday Pay		Holiday Pay	Fixed Amount	477: Salaries
Labour Hire		Withholding Income	Rate per Unit	477: Salaries
Ordinary Time		Regular Earnings	Rate per Unit	477: Salaries
Overtime (1.5)		Other Gross Earnings	1.5x of employee's ordinary earnings rate	477: Salaries
Overtime (2.0)		Other Gross Earnings	2x of employee's ordinary earnings rate	477: Salaries

b) In Clevertime, go to Settings and then Pay Types. For example, pay type NT(normal time) is named "Ordinary Time", the same as Xero earning rate.

Code	Name	Export Code	Daily Hours	Status	In Leave	Operation
ACC	ACC Leave	ACC	-	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
AHC	Alternative Holiday Credited	AHC	1.0	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
AHT	Alternative Holiday Taken	AHT	1.0	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
AL	Annual Leave	AL	1.0	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ALTL T1	Alternative Leave T1	441	1.0	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ALTL T125	Alternative Leave T125	430	1.0	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ALTL T15	Alternative Leave T15	499	1.0	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ALTL T2	Alternative Leave T2	401	1.0	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
BL	Bereavement Leave	BL	-	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DW	Days Worked Count	-	-	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
EXCD	Exceeded Hours	-	-	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MA	Meal Allowance	-	-	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
NT	Ordinary Time	NT	-	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
OT	Over Time	OT	1.0	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PHL	Public Holiday Leave	PHL	1.0	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PHW	Public Holiday Worked	PHW	1.0	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SL T1	Sick Leave T1	438	1.0	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SL T125	Sick Leave T1 25	-	1.0	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>

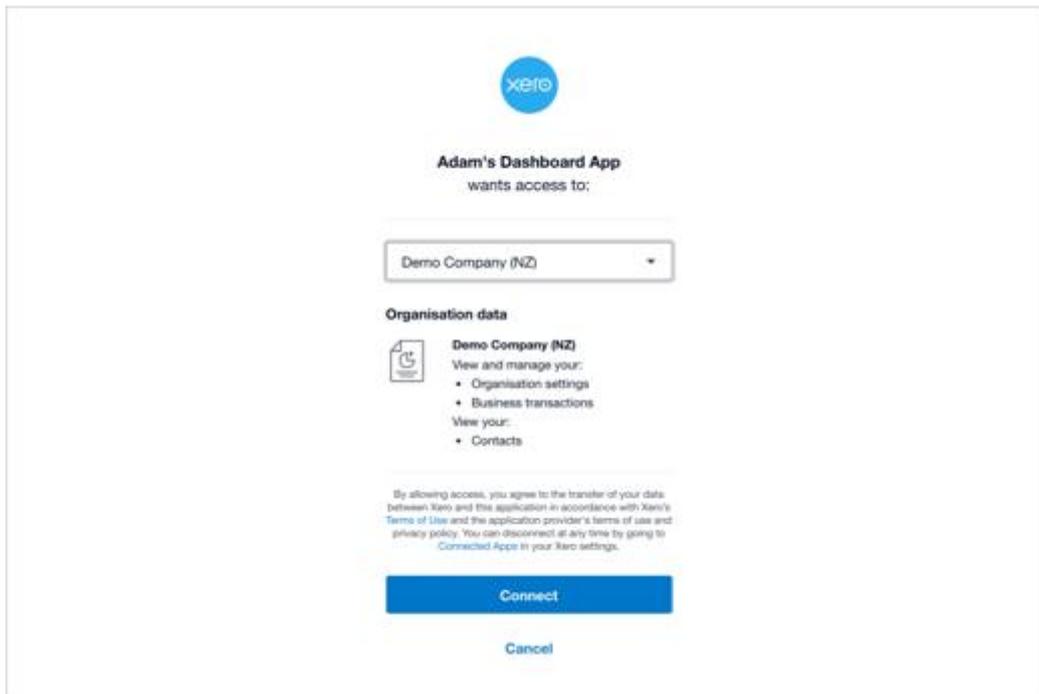
3. Synchronize Xero data to Clevertime

After all the Pay Calendar/Pay Group and Pay Items/Pay Types checked in both systems. Please go to Clevertime's - "Import & export" menu, then "Payroll Transfer". On the top right corner there will be a "Sync Xero" button.



4. Authorize Clevertime access a set of scopes

After click on the Sync Xero button. For the first time, Clevertime will request authorization from your Xero organization & ask for a set of scopes. These scopes will be displayed and describe what data Clevertime will be able to access.



5. *After authorizing Clevertime a full access, we will fetch the following data from Xero:*
 - a) Pay items
 - b) Pay calendars
 - c) Employees

And you are ready to export the payroll data back to Xero timesheet.