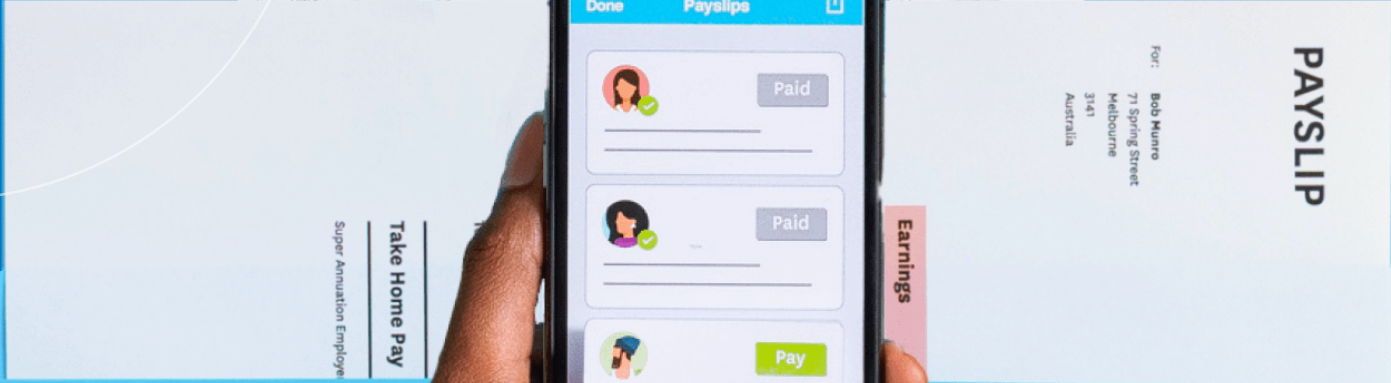
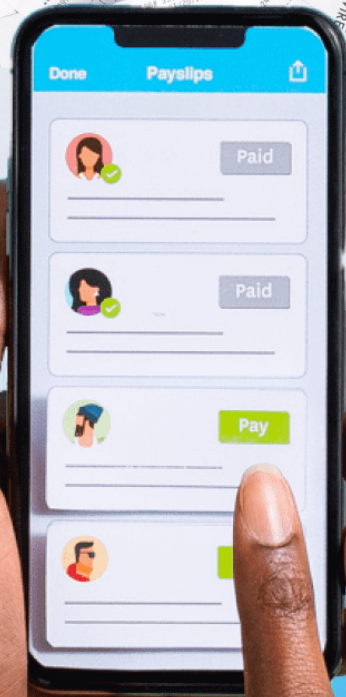


XERO SETUP GUIDE



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ABOUT

This is a guide to step you through setting up your Xero account with Hairware Beautyware Salon Software.



XERO SETUP

To integrate your HB software with Xero, go to www.xero.com to create a new account or login to an existing account.

Once you have logged into xero, go to **Payroll** from the menu, then **Overview**.
Please note this must be done before sinking your HB software with Xero.

Linking the Xero App

To link your Xero account to hairware beautyware, open up a web browser and go to <https://developer.xero.com> and press **enter**.

- Click on **log in**.
- Log in with your xero account.
- Click on **new app**.
- In the app name, type **HB Salon Software**.
- Select **Mobile or desktop app**.
- Type <https://developer.xero.com> as the **Company or application URL**.
- Type <http://localhost:8888/callback> as the **Redirect URL**.
- Accept the terms & conditions and click **Create app**.
- Once the app has been created, click on **configuration**.
- Click on the **copy** button next to the **client id**.
- Go back into **HB Salon Software**, go to **F7 Salon**.
- Then **g Xero Management**.
- Then **1 Setup**.
- Tick the **enable xero integration** box.
- Finally, paste the xero **client id** we copied before and click **save**.

Pay Period Setup

Please note before connecting to Xero, please check that the pay period, and the current pay period start date is correct.

The pay date is the number of days after the end of the pay period.

If you are already using xero, these settings must match the **pay template** in xero.

To set your pay period:

- Go into **HB Salon Software**, go to **F7 Salon**.
- Then **g Xero Management**.
- Then **1 Setup**.
- Select the **Pay Period** (Weekly, Fortnightly, Monthly).
- Select the **Current Pay Period Start Date**.
- Set the **Pay Date**, this is the number of days after the end of the pay period.

Now we have made sure our **client id** and **pay period** is set up correctly, click on the **Connect to Xero** button.

It will open a web browser and ask you to log into your account, then it will request to allow access between your HB software and xero, click **Allow access**.

Once your app is authorised it will display that the client is activated, you can now close the web browser.

That's it, your HB Software is now set up and connected with xero.

OPERATORS SETUP

Before sending your Operators to Xero, please make sure you have set up the **pay period** correctly and then **connected to Xero**.

To setup your Operators to send to Xero:

- Go into **HB Salon Software**.
- Go to **F2 Setup**, then **2 Operator Profile**, and select an **Operator**.

Please make sure you fill out all the information required for each employee.

Required fields:

- First Name
- Last Name
- Address
- Suburb
- State
- Postcode
- Birthdate
- Start Date
- Employment Type (Full Time, Casual, Part Time)
- Tax File Number
- Pay Rate

Optional fields:

- Email (required for STP Phase 2 with Xero)

Handling existing Operators in Xero

If you have existing employees in your Xero account, you can link them by making sure the following fields are exactly the same in Xero and HB Salon Software:

- First Name
- Last Name
- Birthday

Once they have been synced to Xero, before syncing a timesheet you must go into their **Employee Profile** and click on the **Employment** tab. Make sure the following fields are filled out then **Save**.

- Employment type
- Income Type (Default: Salary and wages)
- Employment Basis
- Start date
- Payroll calendar (Default: Weekly)
- Ordinary earnings rate (Default: Ordinary Hours)

Setting up Xero Wages

To set up wages information for Xero:

- Go into **HB Salon Software**.
- Go to **F2 Setup**, then **2 Operator Profile**, and select an **Operator**.
- Select **w Wages**.
- Make sure they have a **Pay Rate** setup, [this is required](#).
- Select **x Xero Rate**, please note the overtime and loading is generated based on the Pay Rate that was setup.
- The Xero Pay Rate is a template for every pay period, once set the pay period will show these default values but can be manually adjusted each period if there are changes.
- To edit the roster template, **double click** on the day and pay rate you would like to edit and input the time.
- If you already have rostered times setup previously, you can import these times by clicking **i Import Rostered Times**, please note this will overwrite any roster you have set up.

[Please note all superannuation and leave accrual will need to be set up in Xero manually.](#)

SYNC OPERATORS TO XERO

Once you have setup all Operators you wish to send to Xero:

- Go into **HB Salon Software**, go to **F7 Salon**.
- Go to **9 Xero Management**, then **2 Sync Operators to Xero**.
- Click on **s Send to Xero**.

It will show a message that HB is sending your employees to Xero, this process may take up to 5 minutes, however you can continue using the software.

If there is any required information missing it will show a message with the information that is required to be filled out, once that has been fixed please try to **Send to Xero** again.

It will show a log of how many employees are sending to Xero as well as the status, this screen will automatically refresh.

You can double click on the number of employees to see which operators are in the submission.

Once the status is Successful go into **Xero**, then **Payroll** and **Employees** to check your Operator details.

You will only need to sync your Operators to Xero once, if there are any changes after they have been linked they must be done on both systems.

SYNC TIMESHEET TO XERO

Once you have synced your Operators with Xero you can start sending your pay timesheets.

- Go into **HB Salon Software**, go to **F7 Salon**.
- Go to **9 Xero Management**, then **3 Sync Timesheet to Xero**.
- It will show the period type and the period date range at the top of the screen, this is from your **Pay Period**.
- To fill out the timesheet and then send it to Xero, click **s Send to Xero**.
- It will show a list of all the operators in the period as well as the total number of hours which is populated from the **Xero Wages pay template** in **Operator Profile**.
- You can **double click** on an **Operator** or select **e Edit** to edit the number of hours for this period.
- Once all pay times have been filled out, click **c Confirm and Send**.

It will show a message that HB is sending your timesheet to Xero, this process may take up to 5 minutes, however you can continue using the software.

If there is any required information missing it will show a message with the information that is required to be filled out, once that has been fixed please try to **Send to Xero** again.

It will show a log of how many employees are sending to Xero as well as the status, this screen will automatically refresh.

You can double click on the number of employees to see which operators are in the submission.

Note: You can send a timesheet for an employee with 0 hours in that period.

Once the status is Successful go into **Xero**, then **Payroll** and **Timesheets** to check your Timesheet details.

Each timesheet is sent with an Approved Status, however you can revert a timesheet to draft if you need to edit this in Xero.

[If there are any changes after you have sent your timesheet to Xero you must do this in Xero.](#)

Once the period has sent to Xero and its status is **Successful**, you can go into the next period:

- Click on either **p Process Period** or **s Send to Xero**. It will ask "Would you like to go to the next period?" and show the next period date.

ADDITIONAL SETUP IN XERO

Prior to processing the first pay run there is some setup required within Xero.

[These are default settings only. We recommend you seek independent advice from your Accountant.](#)

[All of these steps need to be performed prior to your first pay run within Xero.](#)

Setting up Pay Items

Select your **company name** (top far left-hand corner) then select **Settings**, then **Payroll Settings**, select the **Pay Items** tab.

You will need to ensure the 4 tick boxes at the bottom of each Pay Item is selected correctly, however these are examples of default settings. We recommend you seek independent advice from your Accountant.

Earnings Name: **Ordinary Hours**

Exempt from PAYG withholding: **No**

Exempt from Superannuation Guarantee Contribution: **No**

Reportable as W1 on Activity Statement: **Yes**

Earnings Name: **Overtime 1.5**

Multiple: 1.5

Exempt from PAYG withholding: **No**

Exempt from Superannuation Guarantee Contribution: **Yes**

Reportable as W1 on Activity Statement: **Yes**

Accrue Leave for this Earnings Rate: **No**

Earnings Name: **Overtime 2.0**

Multiple: 2

Exempt from PAYG withholding: **No**

Exempt from Superannuation Guarantee Contribution: **Yes**

Reportable as W1 on Activity Statement: **Yes**

Accrue Leave for this Earnings Rate: **No**

Earnings Name: Overtime 2.5

Multiple: 2.5

Exempt from PAYG withholding: No

Exempt from Superannuation Guarantee Contribution: Yes

Reportable as W1 on Activity Statement: Yes

Accrue Leave for this Earnings Rate: No

Earnings Name: Loading 33%

Multiple: 1.33

Exempt from PAYG withholding: No

Exempt from Superannuation Guarantee Contribution: No

Reportable as W1 on Activity Statement: Yes

Accrue Leave for this Earnings Rate: Yes

Earnings Name: Loading 50%

Multiple: 1.5

Exempt from PAYG withholding: No

Exempt from Superannuation Guarantee Contribution: No

Reportable as W1 on Activity Statement: Yes

Accrue Leave for this Earnings Rate: Yes

Earnings Name: Loading 100%

Multiple: 2

Exempt from PAYG withholding: No

Exempt from Superannuation Guarantee Contribution: No

Reportable as W1 on Activity Statement: Yes

Accrue Leave for this Earnings Rate: Yes

Assigning Default Leave Types

You will need to **Assign Default Leave Types** to **Full time** and **Part Time employees**.

- From the **Payroll menu** select **Employees**
- Select an employee and go to the **Leave** tab.
- Click on **Assign Default Leave Types**.
- Click on **0 Hours** for both Annual and Personal/Carer's Leave.

If your employees have Annual Leave or Personal/Carer's leave balances in HB Software that need to be carried across, these hours will need to be manually entered in the Opening Balance box.

[Below are examples of default settings. We recommend you seek independent advice from your Accountant.](#)

Annual Leave

Leave Calculation Method: **Based on Ordinary Earnings**

Hours of leave accrued by a full-time employee: **152**

Hours a full-time employee works in a Weekly pay period: **38**

Opening Balance: **0**

On termination unused balance is: **Paid Out**

ETP leave type: **Yes**

Includes Superannuation Guarantee Contribution: **No**

Setting up Superannuation Funds

Employee's superannuation funds will need to be set up before you are able to assign the superannuation fund to each employee.

Note: If several employees use the same superannuation company the fund only needs to be set up once.

Select your **company name** (top far left-hand corner) then select **Settings**, then **Payroll Settings**, select the **Superannuation** tab, then **Add Superannuation Fund** button.

- Choose the type of fund, either **Regulated Superannuation Fund** or **Self-Managed Superannuation Fund**.
- Then in the **Name** box you are able to search for the fund by name or USI. Start typing and select the correct superannuation fund. Then select **Add**. Continue to do this for all superannuation funds needed.

Now that the funds are set up within Xero you are able to assign the superannuation fund to each employee.

- Go to the **Payroll** menu and select **Employees**.
- Select the employee you would like to update and select the **Employment** tab.
- Go down to **Superannuation Memberships** and select **Add a Superannuation Membership**.
- Select the correct Superannuation Fund you made previously.

You should now be set up and ready for your first pay run.

- Click on either **p Process Period** or **s Send to Xero**. It will ask "Would you like to go to the next period?" and show the next period date.