

Sometimes a business changes hands or decides to move to another payroll solution.

SmoothPay is one of the very few Holidays and Parental Leave Act compliant payroll systems available in New Zealand and integrates with most common accounting systems.

SmoothPay is often far less expensive to run than most of the other commercial payroll systems available.

However, if you choose to make this change we have prepared this guide to assist you.

Note: There is no common standard for data exchange between payroll systems - they are all different and use different file or database formats

SmoothPay provides migration tools (usually at no cost) from most common payroll systems used in NZ, Australia, Samoa, Solomon Islands and Papua New Guinea without requiring any effort on the part of the user other than sending a backup of the current payroll.

Chosen payroll provides migration tools from SmoothPay data?

Your chosen payroll may provide for importing from SmoothPay's database. If so, use the instructions they provide.

Chosen payroll provider imports basic data from CSV, XML, spreadsheet etc?

SmoothPay provides export options from most reports into CSV, XLS and various other formats.

Simply select any report you think might be suitable as a data source, then:

- Use the **Browse** option (instead of Preview) to see what the raw data looks like
- If the data looks useful to you, then use the **Export** options to generate an output file for further processing and import into your chosen payroll.

You cannot easily provide a migrate-able data set (such as bank account deductions in the last pay period with names and account numbers) by performing simple report exports for the following reasons:

1. Reports present data by combining data from multiple tables within the database
2. a raw data extract would only present the raw data and relational ID's to entries in other tables (e.g. empid 234 would require the reader to locate employee 234 in the employee table to get the name, address etc, paycode 123 would probably be a reference to a paycode table entry containing the employee's bank account number and allocation rules) - software does this automatically and only in unusual cases would the export match the content of the report
3. a cooked export (xls, doc, PDF, etc.) are a representation of the actual report and content, but often (esp. XLS) so messy as to be unusable without significant effort by the reader (copy paste etc.)

For these reasons it is always better to use alternative options as outlined in this guide for moving to another payroll, such as the new payroll provider writing additional software, interrogating the database directly, etc., to provide a successful data migration

Note: SmoothPay also provides an XML export option (File..Export) that is used to export a complete data extract from the database in XML format (usually used to migrate to SmoothPay's international payroll for Mac and Windows). This may be a useful alternative to creating various CSV files.

Moving to another payroll

You can also access the data tables directly using Excel or any commonly available DBF viewer (*you'll need the data dictionary to help make sense of the data (available under Reports → Miscellaneous → Data Dictionary)*).

Chosen payroll provider can write a program to import SmoothPay data?

If your chosen payroll provider has the necessary skills they can use SmoothPay's published data dictionary (available under Reports..Miscellaneous..Data Dictionary) to understand the data contained in SmoothPay's database. The programmer can then use this information to extract what they need.

Anyone can install SmoothPay onto their computer and restore payroll data from an archive* created by SmoothPay on any other machine - this way your data can be transferred to the chosen payroll provider so that they can extract what they need.

SmoothPay's database uses standard DBF files, easily accessed using any of the common Microsoft data access tools (e.g. Excel) or any commonly available DBF viewer utility.

***NOTES:** SmoothPay's data archives are password protected to prevent them being damaged during emailing (some email servers examine the content of ZIP files and may remove or alter content making the archive useless). You do not need to know the password as any copy of SmoothPay can restore from the archive and make the data available.

A guide (Moving to a New Computer) explains this process and is available under the SmoothPay help menu and from the website.

If you prefer, or the chosen payroll provider does not want to install SmoothPay, you can simply zip the company data folder (*see About in SmoothPay to determine the current data folder*) and send that to the payroll provider for processing (*password optional but recommended*).

Additional notes

- If you require assistance from the Smoothpay helpdesk with migration to another payroll, then a fee will be payable in advance (our minimum charge is 4 hours) - this activity is not covered by your subscription.
- You should be aware that many payroll providers mention compliance but don't actually provide compliant systems (and are thus illegal and typically disadvantage the employee), for example:
 - annual leave is supposed to be accrued (annually), valued and consumed in weeks (not hours, days or dollars)
 - annual leave that accrues whilst on Parental Leave or the following 12 months is subject to special valuation rules
 - sick leave is supposed to accrue (annually) and be consumed in days (not hours, weeks or dollars)

We would appreciate any feedback you have regarding your use of SmoothPay and reasons for moving to another product so that we can address any obvious issues or concerns you may have. Thank you.

We hope this guide provides you with sufficient information to help you prepare to migrate to your chosen payroll provider and we wish you success with your endeavour.