Naming rates
for payroll integration

# viability.io

xero

myob

## Link Xero and Viability for powerful data and streamlined payroll

Viability is the missing link between daily operations and your finances.

By integrating Viability with your Xero accounting package, you create a highway for information, meaning you don't have to touch any data twice. Changes made in Xero will come to Viability, and information from Viability will go straight to Xero.

# Integration benefits

## Super fast onboarding

Set up your pay rates correctly in Xero to see your entire staff in Viability. Instantly.

## Streamlined payroll

Once your Xero link is established correctly, you'll be able to generate timesheets in seconds and send them straight to Xero. No double-handling data means less time spent on bookwork and less opportunity for error.

## Efficiency and accuracy

Only enter data once – it's faster and prevents discrepancies. Your Viability-Xero connection means your software always stays up to date. Make changes to staff details in Xero and see the changes straight away in Viability.

# Integration Communication

## How does software talk?

For Viability and accounting to communicate properly, they need to speak the same language. In the case of pay rates, that means establishing a rate that both systems can recognise. Viability and other software needs to find the rates put together in a particular way, and allocated correctly to the pay template in your accounting software. Then they can easily read each other's information and understand how to interpret it.

For the connection to work, you've got to use specific language when naming your rates.



## 'Syntax'

Viability and other integrated software wants to see rates written in a particular format so they know what information to interpret from the rate. For pay rates, Viability reads certain information from within a series of square brackets.

Because the software is expecting to see certain information in the brackets, you'll need to make sure they're always there, even if they're empty.

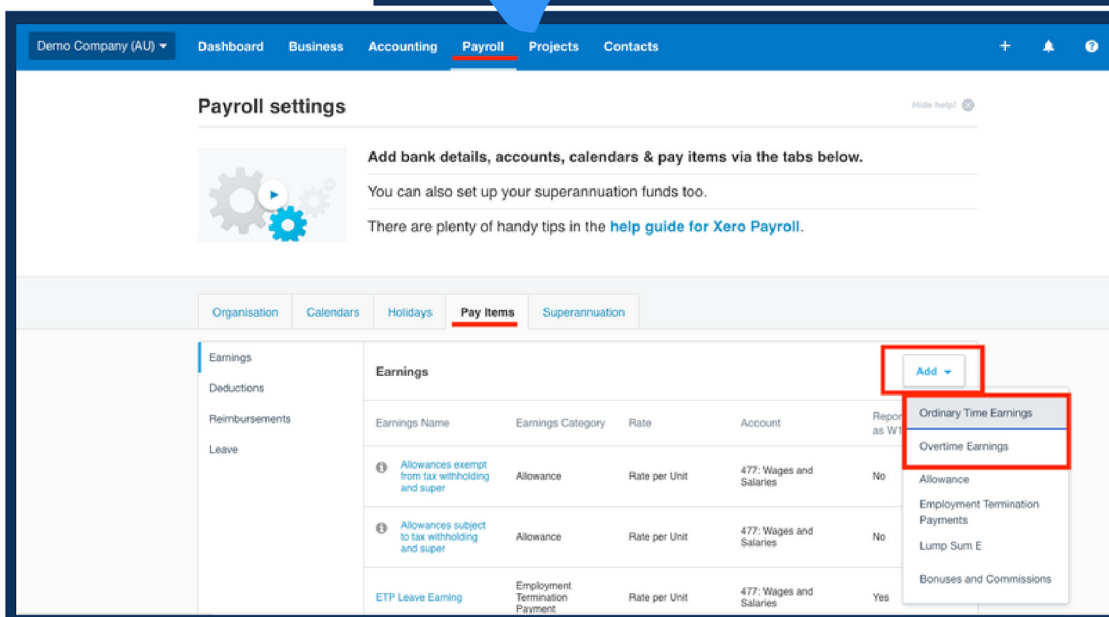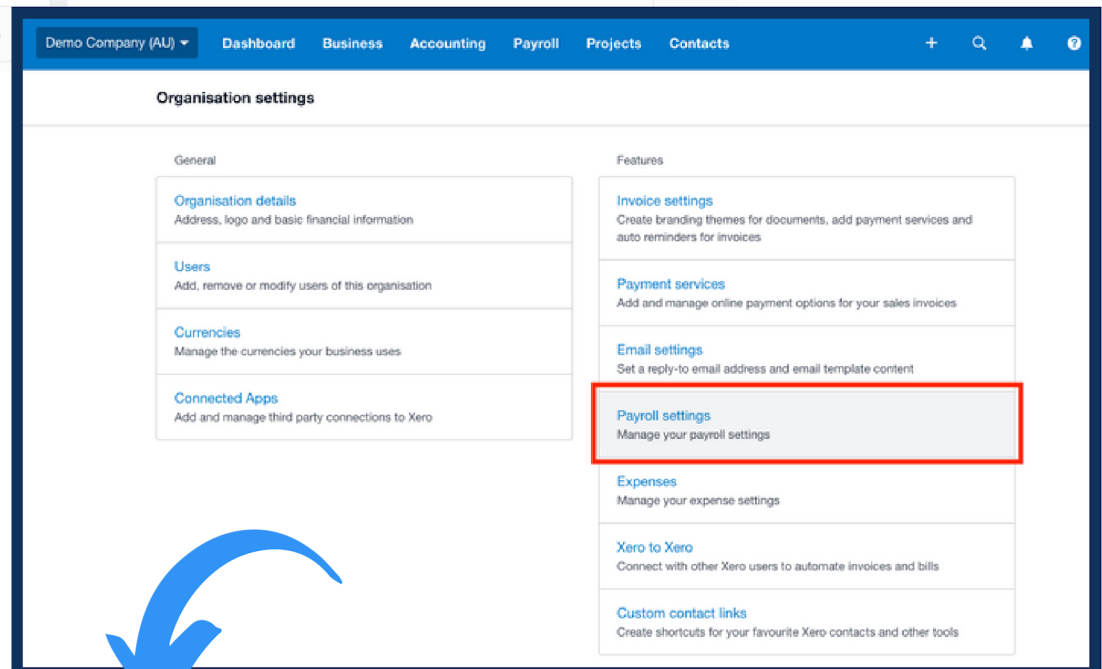Open and close empty fields with no space in between, like this: []

You must have all the brackets present in the rate for the two systems to talk properly.

# Creating New Rates
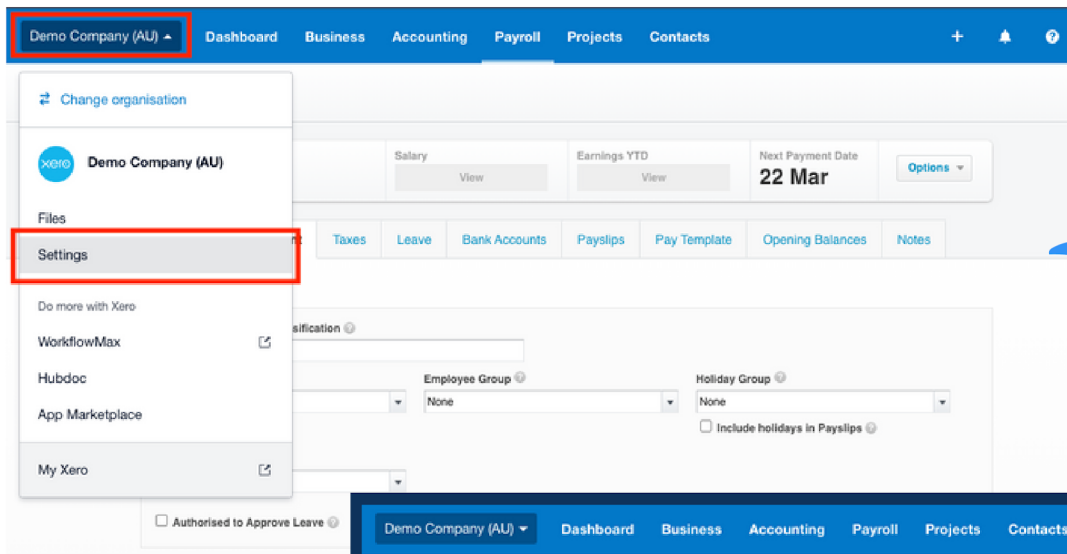


## Creating new rates

To create new rates, go to Settings and select Payroll Settings. Head to the Pay Items tab to add new rates. Most rates for casuals are Ordinary Time Earnings or Overtime Earnings.

# Naming rates in xero

## Rates, earnings lines, pay templates ...

Each employee will have several 'rates', or earnings lines, because each rate reflects different pay for different conditions. One casual employee is likely to have at least three or four rates, and may have more than ten: an 'ordinary' hourly rate, a Saturday and a Sunday rate, a public holiday rate, and the other overtime and penalty rates applicable on different days. Every casual employee should be assigned multiple rates.

Each rate is a code in the Xero integration language that Viability understands. The code contains six different pieces of information about the earnings rate, though many rates will use only the first four.

## 1 Number

This number will help you, your accountant and Viability order and identify your pay rates.
It's important to number your rates logically in the sequence they apply., eg if the Ordinary Rate for weekdays is numbered 01, then the weekday overtime 02, the Saturday rate 03, and so on. If weekdays are 89, overtime should be 90, Saturday rate 91, Saturday overtime 92, etc.

## 2 Label

The label (name) helps you and your bookkeeper or accountant identify the different rates quickly.

## 3 Days

This shows which specific day/ days this rate should apply.

## 4 Hours

This shows what hours of the day this rate should apply.

## 5 Limitations

This shows the minimum and maximum hours during which this rate should apply.

## 6 Tracking code

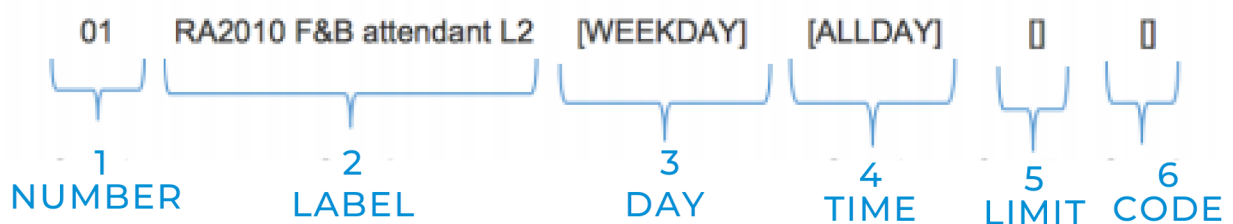This shows a tracking code or rostering area for this rate.

### The Golden Rules

Every rate must:
- be numbered
- have 4 sets of square brackets
- have maximum 60 characters

Format: Number Label [DAY][START TIME-END TIME][MIN-MAX][TRACKING]

| 01 | RA2010 F&B attendant L2 | [WEEKDAY] | [ALLDAY] | [] | [] |
|----|-------------------------|-----------|----------|-----|-----|
| 1 NUMBER | 2 LABEL | 3 DAY | 4 TIME | 5 LIMIT | 6 CODE |

# 1   Number

The number determines the order the rates will appear and be sorted in Viability. Use 01 for the most common rate. Generally, this will be your ordinary time (weekday) rate. Number the rates in order: 01, 02, 03, 04, 05, etc.

*Use 0s in front of any single digits so they appear in the right order: 00, 01, 02, 03, 04, 05, 06, 07, 08, 09, 10, 11, 12, etc.*

# 2   Label (name)

There is no specific format required for the label of the rate. You can choose a label that makes sense to you. This can be a description of the rate, eg. the Restaurant Award 2010 'Adult Casual Food and Beverage Attendant Level 2' could be written as 'RA2010 CAS F&B attendant L2'. Or this could be as simple as 'Adult Casual F&B L2'. Keep labels short. **The entire rate must be fewer than 60 characters**.

# 3   Days

This bracket determines the days on which the rate will apply. You can use any of the following terms in this bracket:

- MON
- TUE
- WED
- THU
- FRI
- SAT
- SUN

- WEEKDAY
- WEEKEND
- PH – Public holiday
- DAILY – All the hours of the day are put into a single daily rate, regardless of actual hours
- !PH – Not on public holidays
- WEEKDAY, !PH – Applies weekdays except on a public holiday
- WED, FRI – Only applies Wednesday and Friday (separate days with a comma and a space)

# 4   Hours

This bracket allows you to set a specific time of day for the rate to apply. Use the format [START TIME-FINISH TIME]. You can use any of these terms:

- [ALLDAY] – The default term to make the rate apply for the whole  day
- [0000-2400] – The time of day a rate will apply for. This must be four digit, 24-hour time. For example, a rate that applies between midnight and 7am should be written in the bracket as [0000-0700].

Overtime hours are also set out in this bracket. They're written as hours rather than a specific time. For example, overtime  hours for Restaurant Award apply after an employee has worked 8 hours in a single shift. Use the format [8~10]. If different overtime rates apply after different numbers of overtime hours, create two separate rates.

- Overtime first two hours [8~10]
- Overtime after two hours [10~24]

# 5   Limitations (minimum and maximum hours) - optional

This bracket indicates if there is a minimum or maximum amount of time required for this rate to apply. Note that this limitation is only applicable if the Xero rate type is "Allowance".

- [] – Leave the brackets empty if no limitations apply.
- [NONE] – An alternative code for no limitations. However, we recommend empty brackets because of the 60 character limit.
- [1-4] – This rate will be paid for a minimum of 1 hour and maximum of 4 hours.

# 6   Tracking code - optional

This is useful for tracking multiple rates for an individual who works in more than one area, such as a barista who also works in the bar and receives a different award rate there.

[] – Leave this bracket empty if you don't need to track rates.

[10] – Use the name of one of your Tracking Codes or Rostering Areas. Note that if you apply this code, the rate will only apply when a shift was worked in the corresponding area.

# Example 1

**Restaurant Award 2010**
**'Adult Casual Food and Beverage Attendant Level 2'.**

**Ordinary rate**
01 RA2010 F&B attendant L2 [WEEKDAY][ALLDAY][][]

**Late Night Rate**
02 RA2010 F&B attendant L2 [WEEKDAY][2200-0000][][]
This rate applies between the hours of 10:00pm-12:00am

**Early Morning Rate**
03 RA2010 F&B attendant L2 [WEEKDAY][0000-0600][][]
This rate applies between the hours of 12:00am-06:00am

**Saturday Rate**
04 RA2010 F&B attendant L2 [SAT][ALLDAY][][]

**Sunday Rate**
05 RA2010 F&B attendant L2 [SUN][ALLDAY][][]

**Public Holiday Rate**
06 RA2010 F&B attendant L2 [PH][ALLDAY][][]

**Overtime Weekday Rate – First two hours OT**
07 RA2010F&B attendant L2 OT [WEEKDAY][8~10][][]
This rate applies when an employee has worked 8 to 10 hours during a single shift on a weekday.

**Overtime Weekday Rate – After two hours OT**
08 RA2010F&B attendant L2 OT [WEEKDAY][10~24][][]
This rate applies when an employee has worked 10 or more hours during a single shift on a weekday.

**Overtime Saturday Rate – First two hours OT**
09 RA2010 F&B attendant L2 OT [SAT][8~10][][]
This rate applies when an employee has worked 8 or more hours during a single shift on a Saturday.

**Overtime Saturday Rate – After two hours OT**
10 RA2010 F&B attendant L2 OT [SAT][10~24][][]
This rate applies when an employee has worked 10 or more hours during a single shift on a Saturday.

**Overtime Sunday Rate**
11 RA2010 F&B attendant L2 OT [SUN][8~24][][]
This rate applies when an employee has worked 8 or more hours during a single shift on a Sunday.

These numbers determine the order in which the rates will be applied. It's important to number the ordinary rate first, then penalties and weekends.

You can include any information in your label that makes sense to you and helps you identify this rate.

# Example 2

**Hospitality Industry General Award**
**'Junior 16-year-old Casual Food and Beverage Attendant Level 1'**

**Ordinary rate**
**32 HIGA Jr 16 F&B attendant L1 [WEEKDAY][ALLDAY][][]**

**Late Night Rate (10pm-Midnight)**
**33 HIGA Jr 16 F&B att. L1 [WEEKDAY][2200-0000][][]**
This rate applies between the hours of 10:00pm-12:00am

**Early Morning Rate (Midnight-7am)**
34 HIGA Jr 16 F&B att. L1 [WEEKDAY][0000-0700][][]
This rate applies between the hours of 12:00am-07:00am

**Saturday Rate**
35 HIGA Jr 16 F&B att. L1 [SAT][ALLDAY][][]

**Sunday Rate**
36 HIGA Jr 16 F&B att. L1 [SUN][ALLDAY][][]

**Public Holiday Rate**
37 HIGA Jr 16 F&B att. L1 [PH][ALLDAY][][]

**Overtime Weekday Rate – First two hours OT**
38 HIGA Jr 16 F&B att. L1 OT [WEEKDAY][8~10][][]
This rate applies when an employee has worked 8 to 10 hours during a single shift on a weekday.

**Overtime Weekday Rate – After two hours OT**
39 HIGA Jr 16 F&B att. L1 OT [WEEKDAY][10~24][][]
This rate applies when an employee has worked 10 or more hours during a single shift on a weekday.

**Overtime Saturday Rate – First two hours OT**
40 HIGA Jr 16 F&B att. L1 OT
This rate applies when an employee has worked 8 to 10 hours during a single shift on a Saturday.

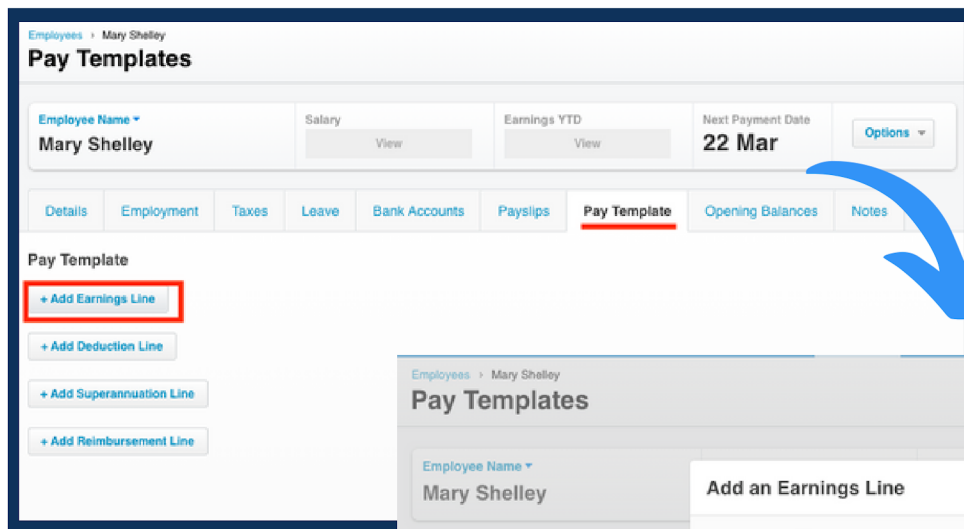**Overtime Saturday Rate – After two hours OT**
41 HIGA Jr 16 F&B att. L1 OT [SAT][10~24][][]
This rate applies when an employee has worked 10 or more hours during a single shift on a Saturday.

**Overtime Sunday Rate**
42 HIGA Jr 16 F&B att. L1 OT [SUN][8~24][][]
This rate applies when an employee has worked 8 or more hours during a single shift on a Sunday.

# Assigning Rates to Employees

Every employee must have a Pay Template and be assigned an Ordinary Earnings Rate.
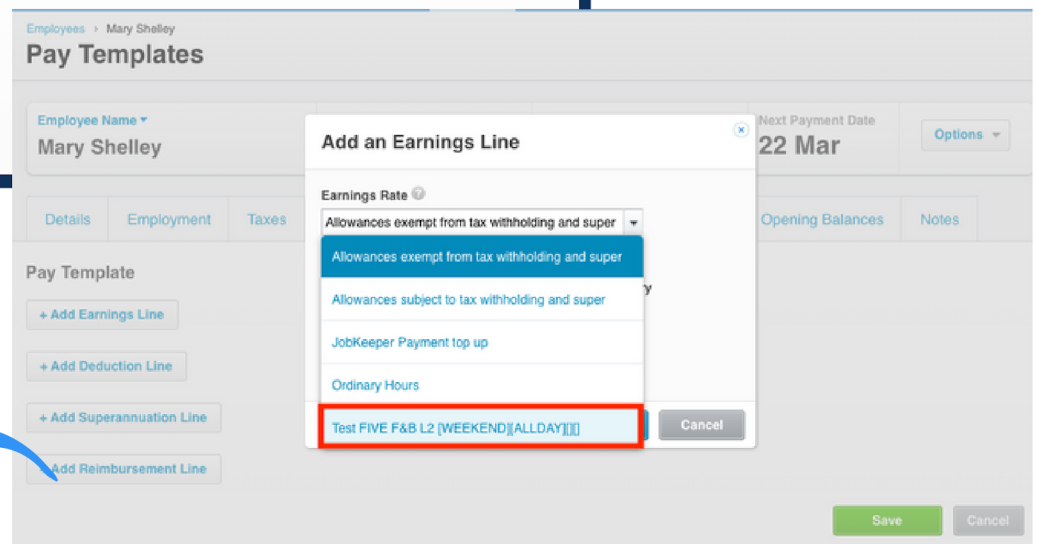


**Add Earnings Lines**

Go to the Pay Templates tab in your employee's card to add earnings lines. Add as many lines as you need to represent all the different rates the employee earns in different circumstances.

**Start Date and Ordinary Rate**

Next, go to the Employment tab in your employee's card to set a start date (in the past). Ensure you set an ordinary earnings rate. This should simply be the line that best represents their normal weekday rate, without penalty, weekends or overtime.

Without these fields filled, Viability and other software can't grab your rates. Viability will show you an error message when you process payroll for employees without Pay Templates and an Ordinary Earnings Rate.

# viability.io

Need help?

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