

# Xero Payroll and Planday:


Work better together




# How does Xero Payroll + Planday help you complete a payrun end-to-end?

**1**  


**Integrate with Xero Payroll**  
Import existing employee details into Planday. Future employees can then be added to Planday first before syncing with Xero.

**2** 

**Leave**  
Employees can request leave, which can be approved or declined by managers. Leave balances are managed through Xero.


**3** 

**Track hours accurately**  
Track employee hours including ordinary, overtime, penalties, paid and unpaid breaks in Planday and sync as individual pay items to Xero.

**4** 

**Run pay roll**  
Approve all shifts for the pay period and all hours will be synced from Planday to Xero in a draft pay run.












**5** 

**Review timesheets**  
Check that the hours have synced from Planday to Xero. You'll also be able to check the hours correspond with the correct pay including any overtime or penalty rates.

**6** 

**Post pay run**  
When you're confident everything is in order you can post the pay run and pay your employees.

The table below shows where to best capture information and what will be synced using the Xero & Planday integration:

| Operating processes          | Planday   | Xero   |
|------------------------------|---|--|
| Employee details             | Personal details including employee name, email address, phone number, birthday   |  → Automatically synced to Xero in Payroll > employees > details  |
|                              | Assign an hourly wage using a classification or manually enter one  |  → Automatically synced to Xero as an hourly wage under Payroll > employee > pay template > rate  |
|                              | Assign an Employee group which defines the job role   |  → Automatically synced to Xero as Earning rates Payroll > employee > pay template > earnings rate  |
|                              | Employee type (FT, PT, Casual)  |  Not required to process payroll  |
|                              | Start date  |    |
|                              | Confidential employee data (TFN, Superannuation, bank details)  |  Captured and managed   |
| Leave                        | Employees can request leave<br>Employers can approve or decline request   |  → Every 'Pay sync', balances are updated<br>Payroll > pay employees > draft payrun > choose employee > approved leave request<br>Leave balances are managed through Xero |
| Hours worked                 | Hours worked: <ul style="list-style-type: none"> <li>• Ordinary hours</li> <li>• Overtime rates</li> <li>• Penalties</li> </ul>   |  → Synced as individual pay items in Xero Payroll > timesheets<br>It will also populate a draft pay run   |
|                              | Breaks: <ul style="list-style-type: none"> <li>• Paid breaks</li> <li>• Unpaid breaks</li> </ul>  |  → Included as ordinary hours<br> → Unpaid excluded from ordinary hours                |
| Integration set up (one off) | Employee groups   |  → Earnings Rate  |
|                              | Overtime<br>Penalty rates   |  → For overtime and penalty rates: Payroll > payroll settings > pay items > earnings  |
| Additional data              | Employee documents: <ul style="list-style-type: none"> <li>• Certifications and templates</li> </ul> Additional custom fields in Employee details (e.g. tick box for onboarding paperwork received, add field for qualifications etc) |   |

|   | Xero Payroll               |   | Xero Payroll & Planday           |   |
|---|----------------------------|---|----------------------------------|---|
| Plan  | Accounting (incl. Payroll) |   | Accounting (incl. Payroll) + TAS |   |
| Pricing (5 users)                                       |                            |   |                                  |   |
| Easy payroll set up with data migration service         | ✓                          |   | ✓                                |   |
| Pay staff   | ✓                          |   | ✓                                |   |
| File STP2 with ATO every pay run                        | ✓                          |   | ✓                                |   |
| Automated Superannuation payments                       | ✓                          |   | ✓                                |   |
| Leave management  | ✓                          |   | ✓                                |   |
| Employee self-service app                               | ✓                          |   | ✓                                |   |
| Time & attendance tracking                              | ✓                          |   | ✓                                |   |
| Expenses management                                     | +                          | Add-on on Premium / Bundled on Ultimate | +                                | Add-on on Premium / Bundled on Ultimate |
| Advanced reporting & insights                           | ✗                          |   | ✓                                |   |
| Built-in award interpretation                           | ✗                          |   | ✓                                |   |
| Rostering   | ✗                          |   | ✓                                |   |
| Employee Communication<br>Messaging, news & events feed | ✗                          |   | ✓                                |   |
| Document storage and contract management                | ✗                          |   | ✓                                |   |
| POS integration to retrieve actual sales data           | ✗                          |   | ✓                                |   |
| Task management   | ✗                          |   | ✗                                |   |
| Employee self-onboarding                                | ✗                          |   | ✗                                |   |
| Employee performance & qualification management         | ✗                          |   | ✗                                |   |