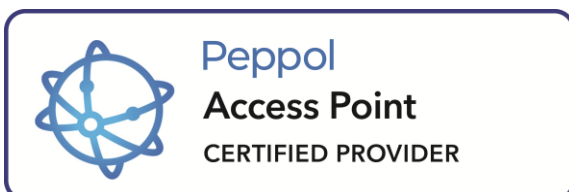




OZEDI Superannuation Service Dashboard Quick Start Guide

LawMaster

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Introduction

This OZEDI Superannuation Service Dashboard Quick Start Guide is designed to make the self-registration process as quick and easy as possible.

For more detailed information, please refer to the [OZEDI Unified Experience Dashboard User Guide](#).

The OZEDI Superannuation Service is one of the services accessible via the OZEDI Unified Experience Dashboard. Only services implemented by your Software Provider will be visible in the Dashboard.

Selection of Superannuation Contribution Payment Method

During the registration process, the selection of the payment method for making the superannuation contributions to the Funds is required. See section 7.1 below for descriptions of the available methods.

PayTo Agreement Payment Method – More Information

If planning to make contribution payments via the New Payments Platform (NPP) using a PayTo Agreement, your first step prior to registering with OZEDI, is to contact your bank and check the following:

- Is your account NPP enabled?
- Does your bank:
 - Allow you to authorise PayTo Agreements on your bank account?
 - If yes, what is the limit that your bank allows to be withdrawn per transaction under a PayTo Agreement?
 - Will this limit allow you to do your contribution cycle? E.g. if the bank advises the limit is \$25,000 per transaction and your fortnightly run in total is \$26,000 then a PayTo Agreement will not work for you. In this instance, you can choose Zepto > Transfer Method. See more information below ref Section 7.1

RewardPay Payment Method – More Information

If planning to make contribution payments via RewardPay, it is recommended to check the current RewardPay fees and charges.

Registration Steps

1. Create the First User using the Registration Link

Use this step once to create your first User. After that, this link is not required. You can add more Users within the dashboard.

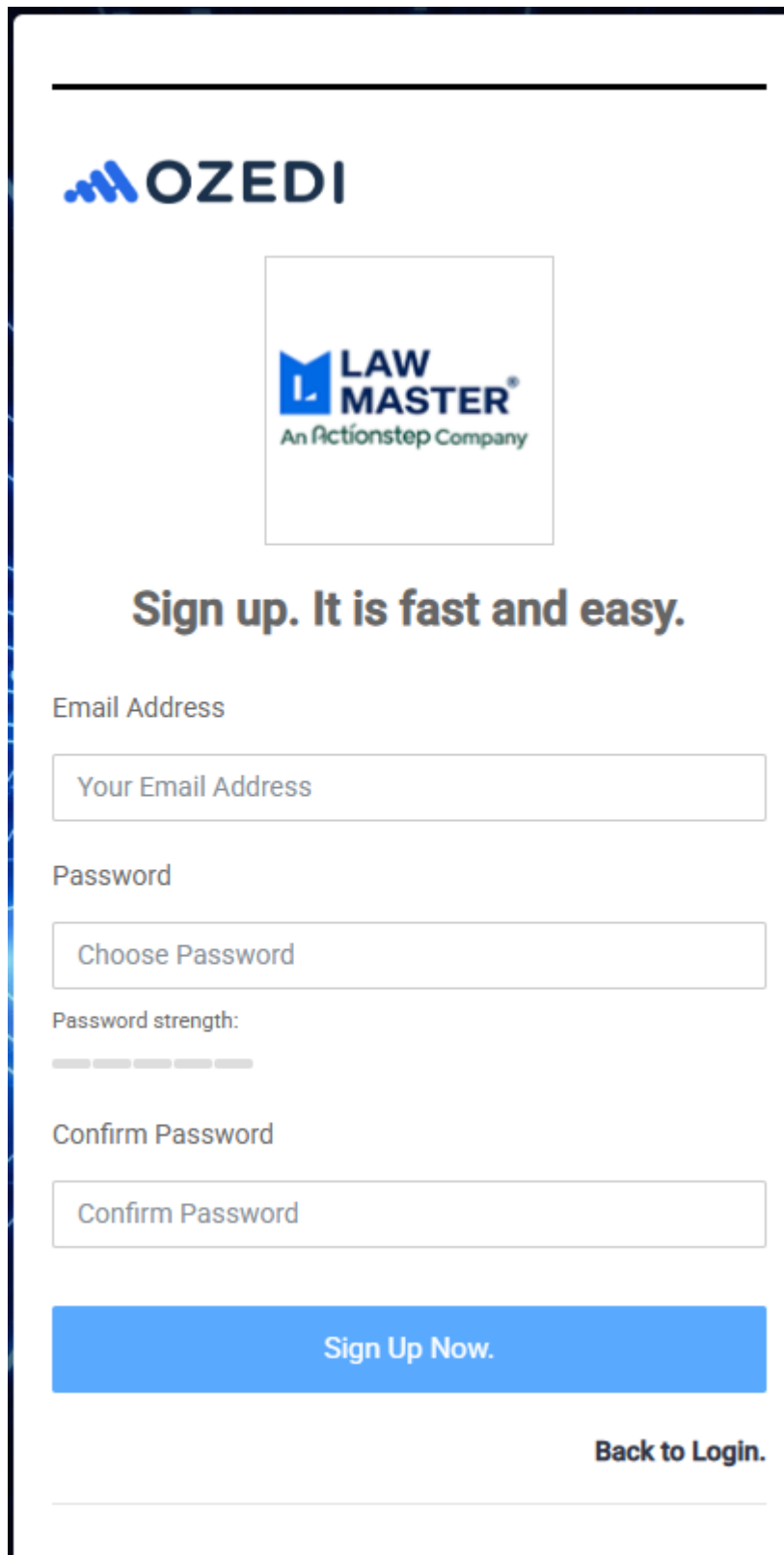
Click on this link:

<https://dashboard-ebusiness.ozedi.com.au/registration?link=7115116101-R>

An account activation email from noreply@ozedi.com.au will be sent to the email address entered, which will contain a link to activate your account. If you don't receive the email within a few minutes, please check your junk and spam folders.

This first user will be the administrator of the account.

Popup blocking software may interfere with the webpage loading so may need to be disabled.



The screenshot shows a sign-up form for OZEDI. At the top left is the OZEDI logo. In the center is a box containing the LAW MASTER logo, which includes a blue square with a white 'L' and the text 'LAW MASTER' and 'An Actionstep Company'. Below the logo is the text 'Sign up. It is fast and easy.' The form consists of several fields: 'Email Address' with a text input field containing 'Your Email Address'; 'Password' with a text input field containing 'Choose Password'; 'Password strength:' with a progress indicator of five grey dashes; 'Confirm Password' with a text input field containing 'Confirm Password'. At the bottom is a large blue button labeled 'Sign Up Now.' and a link labeled 'Back to Login.'

2. Sign into the OZEDI Dashboard

Once you are a registered User, the following link is all you require. Please save this link in your browser as a favourite.

<https://dashboard-ebusiness.ozedi.com.au/login>

3. Create an OZEDI Account

This account holds the account balance from which payment for the OZEDI Service will be deducted. It is not the account from which superannuation contributions are deducted.

Select "+ Create Account(s)" to start. You will be required to complete:

- Account Name
- Services. Select "SuperStream" (Superannuation)
- Contact Details (at least one)

Additional Account Contacts can be added. Account Contacts are used when Alerts of low Account Balance are setup.

(See pg. 14 of Unified Experience Dashboard User Guide for more information on Accounts and the facilities available)

4. Add Additional Dashboard Users (Optional)

To add additional users that can login to the Dashboard go to:

- Navigate to Account > Manage Account
- Go to the tab "Manage Users" and "+ Add"
- Complete the First Name, Last Name, and email address.
- Select the User Role as "OZEDI Dashboard Access"
- Click on "Add User". An email will be sent to the email address with a link to set the password.

(See pgs. 23-24 of Unified Experience Dashboard User Guide for more information)

5. Add to Your Account Balance

The Account balance shown on the Dashboard is used to pay for the OZEDI Superannuation Service. (not for the contributions to the funds)

Go to Accounts -> Manage Account -> Add to Account.

Enter an amount, accept the terms and conditions and click on "Add to Account".

The account balance can be increased using one of the following two methods:

- i. Via Your PayPal Account; or
- ii. Via Credit Card and PayPal Guest Checkout

(See pgs. 16-21 of Unified Experience Dashboard User Guide for more information)

5.1 Low Account Balance Alert Level (Recommended)

This step is optional but recommended. This enables notifications by email to be sent when your account balance reaches the low level you nominate. Notifications will be sent to the account contact(s) with the "notification" check box ticked.

Important: If the account balance goes to \$0.00, processing maybe restricted.

(See pg. 22 of Unified Experience Dashboard User Guide for more information)

6. Register Your Company Details– Add a ‘Client’

A ‘Client’ is where the company details of the Sender are recorded in the OZEDI Superannuation Service. One and only one ABN/WPN is stored per Client and you can have multiple clients if required under your account.

Navigate to Manage Service > Manage Clients and select “+ Add”.

A new client registration for Superannuation requires:

- Client Name – Your company name
- ABN/WPN
- Payment Provider. You have the following options to choose from:
 - **Instant Payments (Zepto) - PayTo Agreement** via New Payments Platform (NPP). An NPP direct debit agreement completed by you and your bank via OZEDI (see below for more information)
 - **Instant Payments (Zepto) - Transfer** via New Payments Platform (NPP). Rather than direct debit, you can organise to send the total contribution funds to OZEDI via bank transfer. We recommend you use fast transfer to OZEDI to ensure that it is sent instantaneously, otherwise, we may have to wait for the BECS 1-3 day clearance time (see next page for more information)
 - **RewardPay.** Payment with an American Express credit card via Amex-approved aggregator RewardPay
 - **Manual Payments.** The payments to the Super Funds are made outside of the OZEDI Superannuation Service. For example, via bank transfer from your banking software.
- Client Contacts - Contacts on the Client can receive status updates from the processing of superannuation.
 - Add a Contact Name and Contact Details
 - Ensure that “Notification” is selected to receive notifications
 - You can add additional Contacts by selecting “+Add Another Contact”
- Click “Add Client” - this completes the Client registration
- If you have selected to pay contributions by PayTo Agreement, another screen will display to enter the agreement details. See Payment Methods below.

6.1 Payment Methods

6.1.1 Instant Payments (Zepto) – PayTo Agreement

- This method uses the New Payments Platform (NPP) for instant payments
- A PayTo Agreement allows OZEDI to extract the funds required to pay the superannuation contributions to the super funds
- When adding your Client above, select “Zepto” and select “PayTo Agreement”
- Successfully adding the Client brings up a new screen to enter the details for the PayTo Payment Agreement.
 - **Bank Details.** BSB and Account Number
 - **Maximum Amount Per Transaction.** This is the maximum amount that can be withdrawn from your account per transaction e.g. if it is \$10,000

for a particular contribution run, then you may add a buffer and have it maximum \$12,000

- **Payment Cycle.** Monthly, or Quarterly, or Annual
- **Maximum Payments Per Payment Cycle.** If for example you are doing super payments weekly, then you will need to select “Monthly” for the Payment Cycle and 4 payments for each month
- Complete the details requested, Read and Accept the Terms and Conditions, and click on “Submit to my Bank for Approval”.
- Your bank will record the PayTo Agreement awaiting your company’s approval online. Go to your company’s banking application online and follow the instructions provided to complete this PayTo Agreement authorisation
- Once complete in your banking system, your client registration should show the PayTo Agreement as “Active” in your OZEDI Dashboard. It can now be used.

(See pgs. 44-47 of Unified Experience Dashboard User Guide for more information)

(See screenshot next page)

Payment Agreement Request

This is a request to create a PayTo Agreement with my bank which will be approved before any payments can be deducted. This agreement will enable **Ozedi** to provide **Zepto** with instructions to deduct funds from the bank account below and distribute the contribution amounts to the superannuation funds according to the payments details available in the Payments List with each file uploaded to Ozedi. Funds will only be deducted when the amount has been authorised for each upload.

Description

Payer

Bank Details for PayTo Agreement:

Payer BSB

Payer Account

Maximum Amount per transaction | \$ 12,000

Payment Cycle

Maximum Payments per Payment Cycle

Ozedi Holdings Pty Ltd (ACN 167 142 672) ("Ozedi") is a corporate Authorised Representative (number 1306064) of Amplus Global Pty Ltd (ACN 162 631 325), the holder of Australian Financial Services Licence number 505929.

I have read and accept the terms and conditions

[Submit To My Bank For Approval](#)

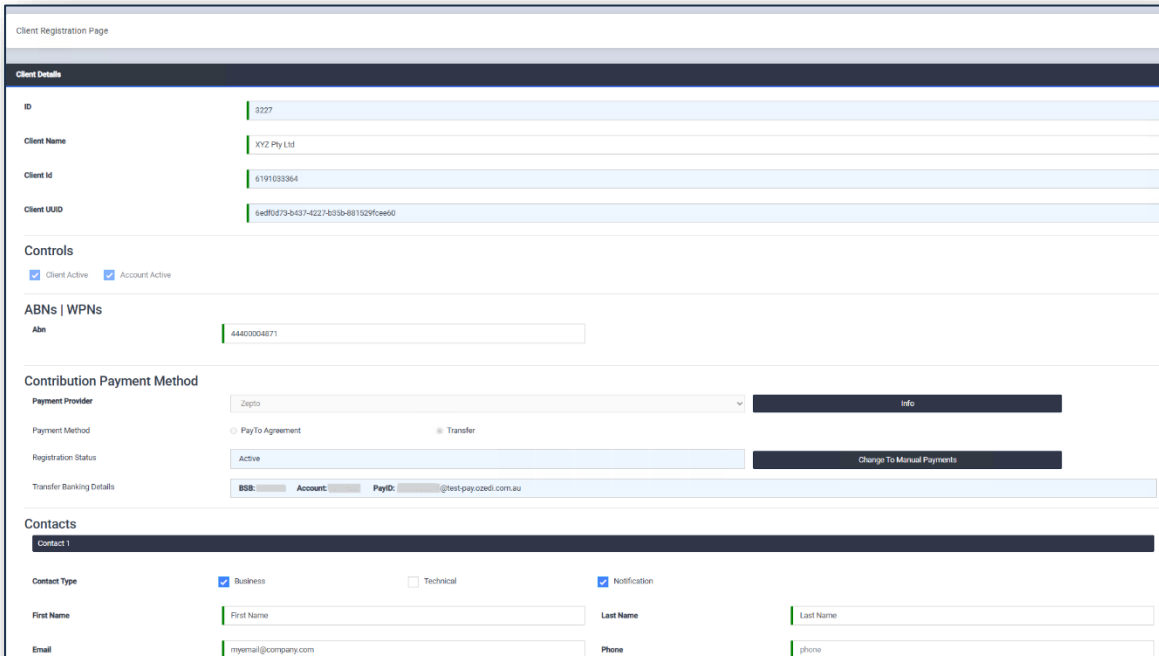
6.1.2 Instant Payments (Zepto) – Transfer

- This method uses the New Payments Platform (NPP) for instant payments

- The Transfer method allows you to transfer the total contributions amount to OZEDI for distribution to the superannuation funds
- When adding your 'client' above, select "Zepto" and select "Transfer". Currently your registration status is "Preparing Transfer Banking Details"
- The Client registration changes to "Pending". OZEDI is preparing a PayID, BSB, and Account number specific for you to send funds to. Wait a few minutes while this task is completed, then edit the client and to see that it is "Active" and that you have been provided with a PayID, BSB, and Account Number
- If NPP such as PayID is used, your transfer of monies from your bank account to your designated OZEDI float account should be close to instantaneous. If not, and BECS payment is used, then your superannuation workflow start of the process could have a 1-3 day delay

(See pgs. 48-50 of Unified Experience Dashboard User Guide for more information)

(See screenshot next page)



The screenshot displays the 'Client Registration Page' with the following sections:

- Client Details:** ID (2227), Client Name (XYZ Pty Ltd), Client Id (619103384), Client UUID (6e8f0673-b437-4227-b03b-88132f0ee60).
- Controls:** Client Active (checked), Account Active (checked).
- ABNs | WPNS:** Abn (44403004871).
- Contribution Payment Method:** Payment Provider (Zepto), Payment Method (Transfer selected), Registration Status (Active), Transfer Banking Details (BSB, Account, PayID: @test.payozedi.com.au).
- Contacts:** Contact 1 with fields for Contact Type (Business checked), First Name, Last Name, Email, and Phone.

6.1.3 RewardPay

Selecting the Contribution Payment Method Payment Provider as RewardPay will require entry of your RewardPay Customer Number. Your RewardPay customer number can be found by logging into your RewardPay account, clicking on Setting, then Organisation. This screen shows a Customer ID – enter this number into the Customer Number field on the Client.

6.1.4 Manual Payments

“Manual Payments” are those made external to OZEDI’s Superannuation Service.

7. Setup Multi-Factor Authentication (MFA)

The Service has the option for Dashboard Users to enable multi-factor authentication. Login to the Dashboard and click on “User Details” in the top right hand corner. You are able to enable Multi-Factor Authentication (MFA) to your login. Any subsequent users are able to enable MFA for themselves.

(See pgs. 28-29 of Unified Experience Dashboard User Guide for more information)

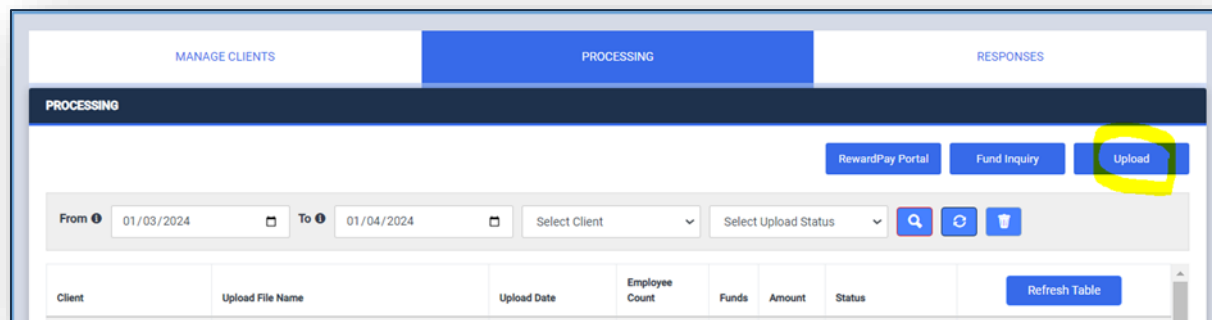
8. Registration Completed!

You are set up and ready to send superannuation contributions – payments and remittances.

Uploading via the Dashboard

This is a quick guide to processing your superannuation compliance requirements using OZEDI's Superannuation Service.

1. Login to the dashboard: <https://dashboard-ebusiness.ozedi.com.au/>
2. Click on "Manage Service"
3. Under the "Processing" tab on the dashboard, click on "Upload" and the upload screen will display



4. On the upload screen, select your Client from the list. The choice to "Validate File" or "Proceed to Upload" is given.
5. If "Validate File" is selected, a prompt to choose a file from your machine to upload for data checking is given. This option only performs a check on the data in the uploaded file.
6. If "Proceed to Upload" is selected, the file uploaded will be validated and then processing of the superannuation contributions will be done. From the contact list select the email address to send the authentication code. Click on "Send Authentication Code". An email will appear in the email inbox of the authenticator with a six-digit code. Enter the code on the upload screen and continue.
7. If you have signed into OZEDI with multi-factor authentication, then you will not need to authorise this upload. If you didn't, then you will need to authenticate yourself. Select from the contact list the email address to send the authentication code. Click on "Send Authentication Code". An email will appear in the email inbox of the authenticator with a six-digit code. Enter the code on the upload screen and continue.
8. Under "File Upload", click on "Choose File" and select the SAFF (CSV) file output from your payroll system.

The screen should now look like this:

The Payment Method will default to that entered on the Client, or it can be overridden to be “Manual” if you need to make payments outside of the OZEDI Superannuation Service.

9. Click “Upload” on the bottom of the screen. This will initiate the upload process which includes checking your data for errors.
10. You will then be taken to the “Processing” tab where the status of the upload can be viewed:

| Upload Date | Employee Count | Funds | Amount | Status |
|---------------------------|----------------|-------|----------|--------|
| Apr 10, 2024, 11:23:59 AM | 3 | 1 | \$672.25 | READY |
| Apr 5, 2024, 1:17:29 PM | 1 | 1 | \$803.50 | READY |
| Apr 5, 2024, 1:11:58 PM | 1 | 1 | \$803.50 | READY |
| Apr 5, 2024, 12:46:37 PM | 1 | 1 | \$803.50 | READY |

- a. If there are **errors**, you will see the status of PRE-PROCESSING FAILED. Select on Actions > “View Upload Errors”, download the spreadsheet and correct the errors in your payroll system. Then create another SAFF file and repeat the Upload.

- b. If your upload is error-free, the status will display as either READY or AWAITING PAYMENT depending on your payment method selected. Use Actions > “View Payments” to produce a spreadsheet of the payments for your review.
- c. Paying contributions:
 - i. If paying contributions using **Zepto PayTo Agreement**:
 - Your status of your contribution run will show as READY
 - Click Actions > “Make Payments” to initiate the extraction of funds and the distribution of payments to the super funds. The remittances will be sent automatically when payment is successful, completing the process.
 - ii. If paying contributions using **Zepto Transfer** method:
 - The status of your contribution run will show as AWAITING PAYMENT
 - You then need to go to your online banking portal and transfer the total amount to the **bank details or PayID allocated to your Client (company) registration**. If you are unsure of the correct banking details to send the money, please go to Manage Service > Manage Clients and “Edit” your client. This will show you your BSB, Account Number, and PayID. You can use the BSB/Account Number or the PayID to make the payment. Please note: These bank details for your company registration remain constant and do not change. If you need to do more than one company registration for Transfer method, each company registration has different BSB/Account Number and PayID details i.e. specific bank details connected to each Client registration in the OZEDI Dashboard.
 - When the money has cleared on your bank’s side and is received by OZEDI, the money will be automatically distributed to the super funds. The remittances will be sent automatically when payment is successful, completing the process. To ensure instant transfer of funds and no delays in super payments, make your payment using “fast payments” or OSKO, or however your bank identifies NPP payments on their portal.
 - iii. If paying contributions by **credit card** such as Amex, Visa, or Mastercard:
 - The status of your contribution run will show as READY
 - Click Actions > “Make Payments” to send the payment details to **RewardPay**
 - Then click on “RewardPay” button to take you to their website. You will need to sign in and authorise the payments against your credit card.
 - The remittances will be sent automatically when the payments are successful, completing the process.
 - iv. If paying contributions **manually**, i.e. outside OZEDI:
 - The status of your contribution run will show as READY
 - Use the facilities you have available to make the payments. At this point, the remittances have not been sent
 - Once payments to each super fund have been completed outside of OZEDI, then you need to send the remittances. Select Actions > “Send Remittances” to complete your contribution run send.

Contact Us

If you require any assistance with regards to the OZEDI Superannuation Service, please contact OZEDI.

If you require assistance with your software / payroll application please reach out to your software provider.

OZEDI

For further information, refer to the [OZEDI Unified Experience Dashboard User Guide](#).

Require further assistance? Please contact OZEDI:

Email: support@ozedi.com.au Website: <https://ozedi.com.au/contact-us/>

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If you require assistance regarding your file format, population of data into the file, etc. or anything else relating to your application, please reach out to [LawMaster Support](#).