

Creating An OZEDI Payday Super Account

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Introduction

This document describes in simple terms the process of opening an OZEDI account, plus once created how you link Automation payroll which enables your superannuation transactions to flow through automatically to the OZEDI platform. It is suggested that you use this document in conjunction with the OZEDI superannuation service dashboard quick start guide, you can download the PDF directly from Automation or click on the link below:

[OZEDI Superannuation Service Dashboard Quick Start Guide](#)

Firstly, let us explain the architecture, there are two registration processes, one is to open an OZEDI account which is performed from the OZEDI portal, the registration link is available from the Automation online menu / OZEDI. Once you have completed the registration and have confirmation that your account is open you can move onto the second step which is linking Automation to your new account. The notes below describes in detail what you need to do.

Critical Steps

- 1) Sign up for OZEDI account.
- 2) Put some money in the balance.
- 3) Create the client record, that also represents the business.
- 4) Setup ZepTo PayTo arrangement with a nominated bank account OR alternate payment method
- 5) Create the second user credentials for the API_ROLE (allows for Automation integration), using a second email address.

Sign Up OZEDI Account

Click on the registration link in Automation Online / OZEDI > Registration or use the link below, you are taken to a sign-up form enter the following details:

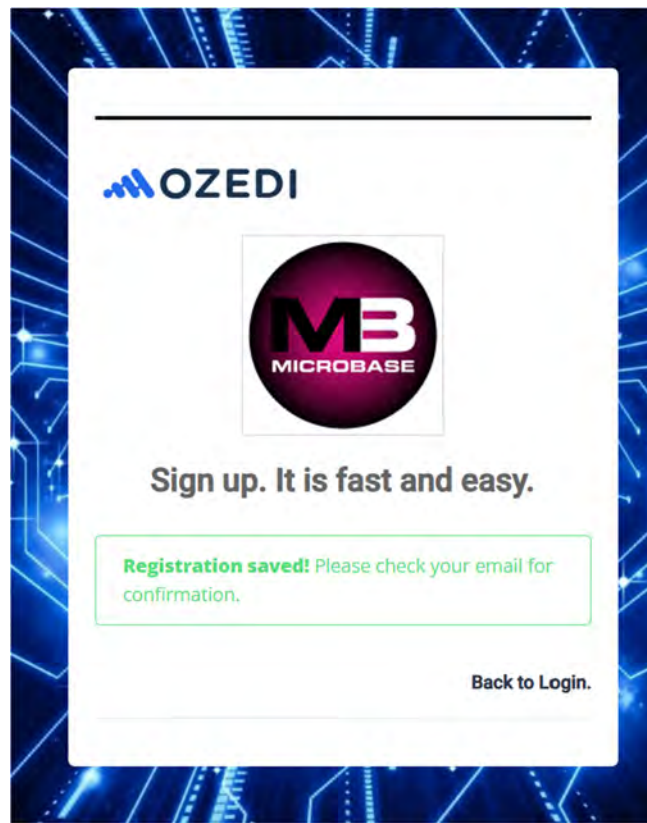
<https://dashboard-ebusiness.ozedi.com.au/registration?link=1119897115-R>

Email Address

Password (must be 12 characters with numerics and special characters)

Confirm Password

The screenshot shows a sign-up form for OZEDI Microbase. At the top left is the OZEDI logo, and below it is the Microbase logo (a purple circle with 'MB' and 'MICROBASE' text). The text 'Sign up. It is fast and easy.' is centered. The form includes an 'Email Address' field with 'Ross@microbase.com.au', a 'Password' field with a strength indicator (a green bar), and a 'Confirm Password' field. A blue 'Sign Up Now.' button is at the bottom, with a 'Back to Login.' link below it.



Sign Up Form

Registration Confirmation

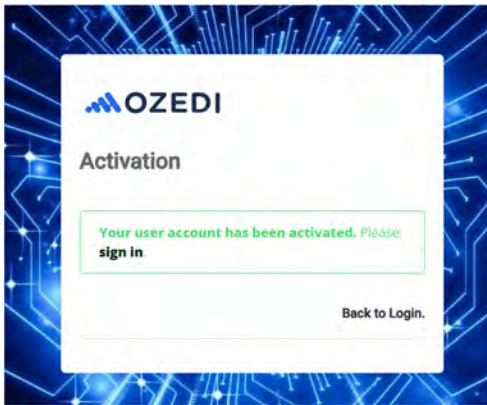
Dear ross@microbase.com.au

Your b2bhub account has been created, please click on the URL below to activate it:

<https://dashboard-ebusiness.ozedi.com.au/activate?key=FC505WZScEbA6iHF9LGX>

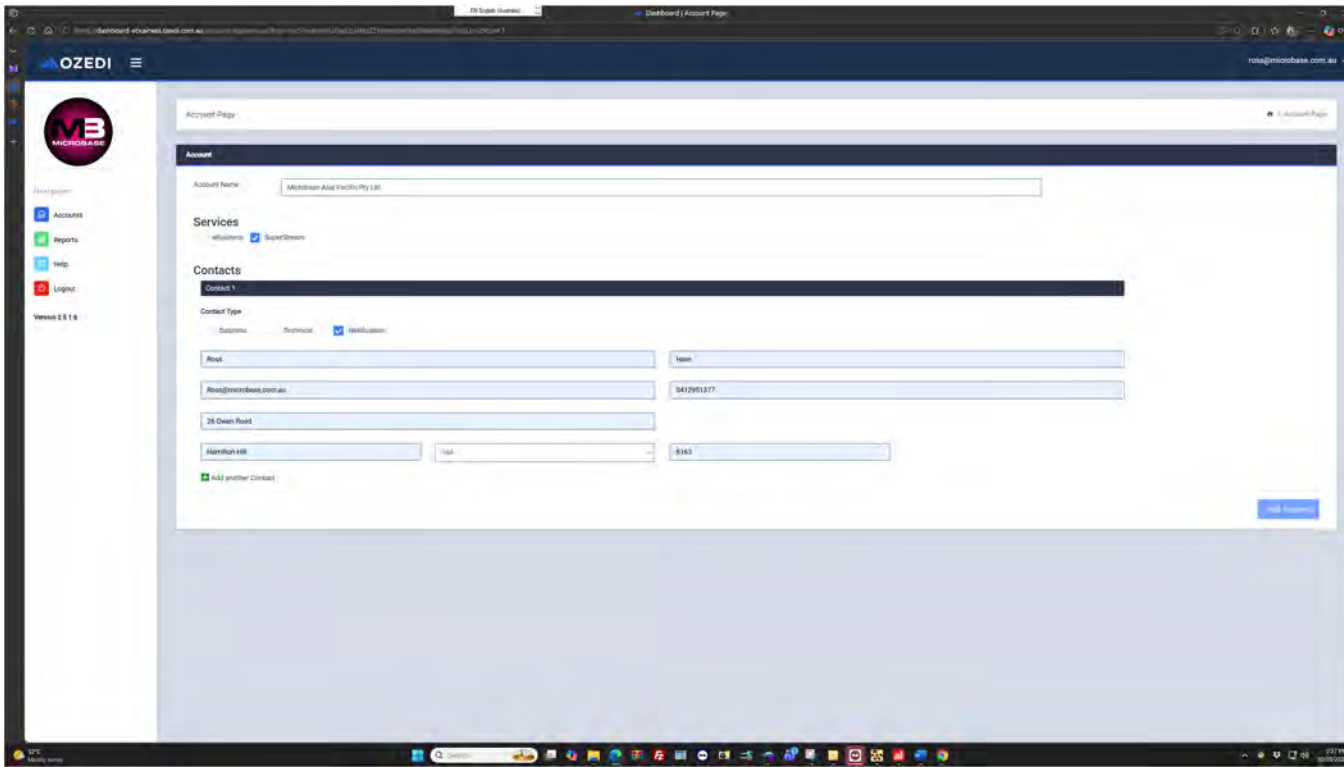
Regards,
OZEDI Support Team.

You will receive the above email, click on the dashboard link provided.

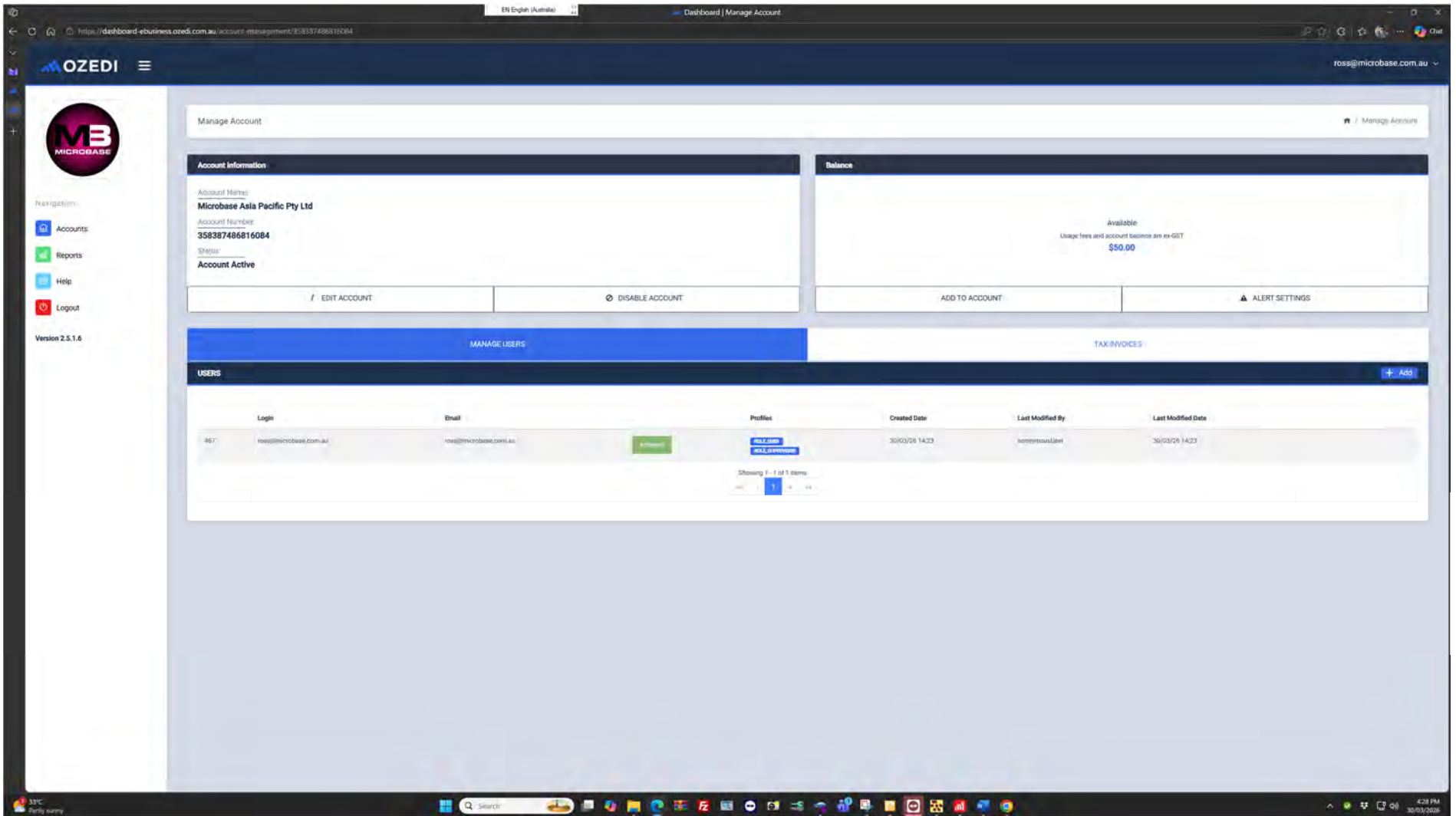


You will see the above screen, select Sign In Enter your email and password

On signing in you will be taken to the dashboard



Enter your information into the fields displayed, select Add Account



You will be taken back to the above screen, you can't move forward without making a deposit to your account of at least \$50.00, this is NOT a value to be used to pay superannuation it is a deposit to be used to pay the service fees. To add money to your account, click on the ADD TO ACCOUNT option.

Add to Account
✕

If your account balance is low, you can increase it at any time. Please enter the dollar amount you wish to add to your account.

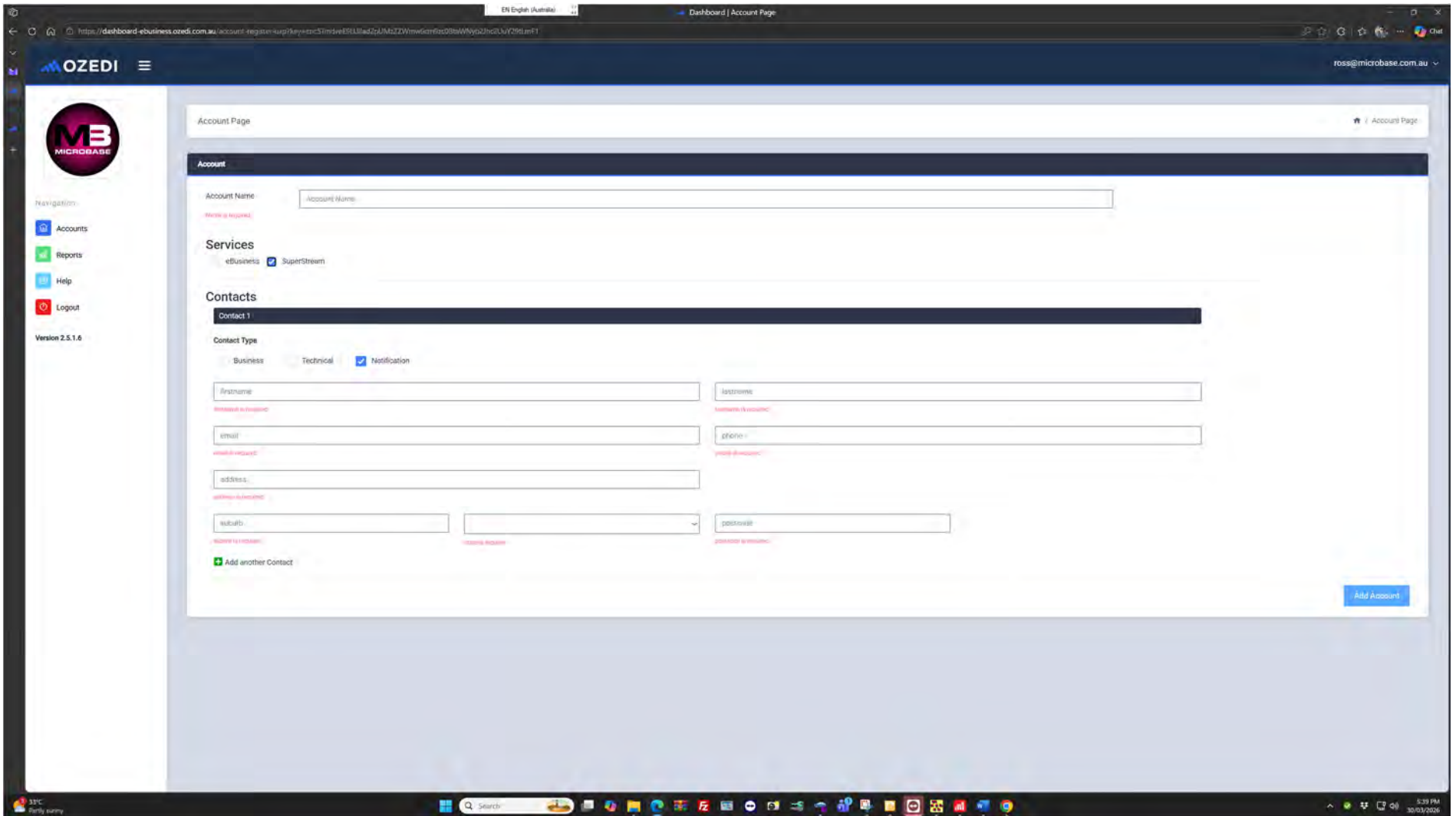
Please enter the dollar amount you wish to add to your account.

| | | |
|------------|-----------|----------------------|
| | Amount \$ | |
| Tax Rate % | 10.00 | GST \$ 0.00 |
| | | Total Amount \$ 0.00 |

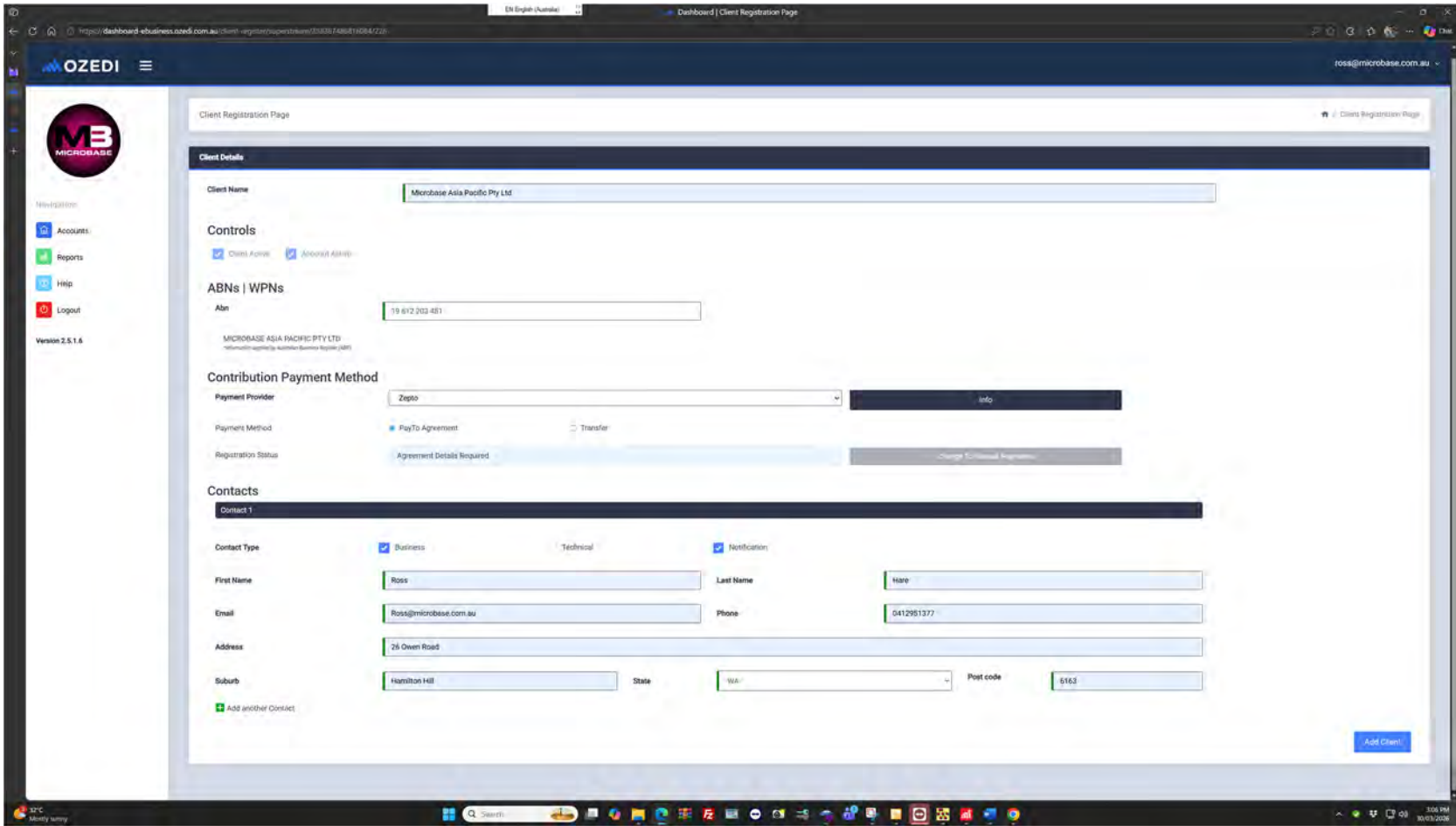
Please accept the [terms and conditions](#)

Enter the amount you wish to deposit, the minimum is set at \$50. Pay via PayPal or credit card, you can also set ALERT SETTINGS once this payment is made you can move forward to enter your full business details. You can also set ALERT SETTINGS from your dash board, set a minimum value ie: \$5.00, when your funds fall below the nominated value you will be notified via email.

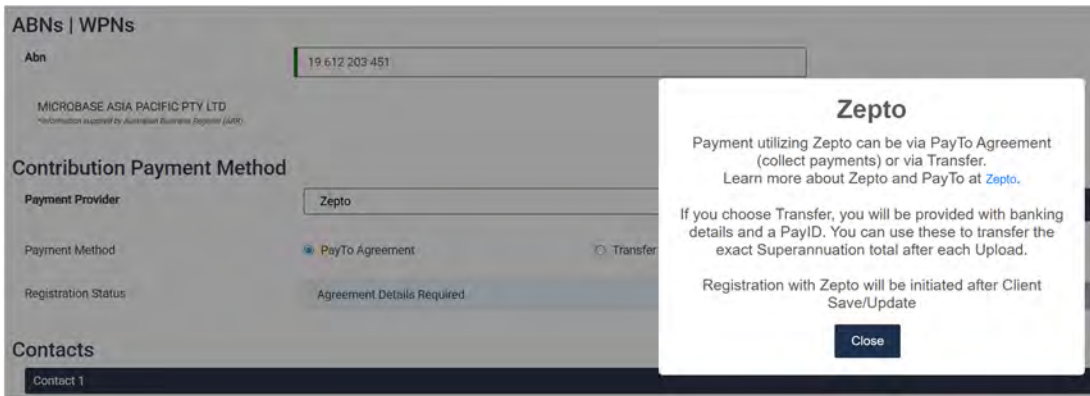
To enter you full details you will need to select MANAGE USERS, enter your business name it the title field, then select ADD, complete the business details including your ABN, address, phone # etc.



Included in the client setup is the payment option, in this example we have chosen the Zepto method, this is a payment service that you give authorisation to via OZEDI to withdraw the funds to pay superannuation directly from your bank account. There are other options available, to see the list please refer to the OZEDI Dashboard Quick Start Guide.



From the contribution payment method select Zepto and you will see the screen describing the services available via this service provider.



Choose pay to agreement or transfer

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: Superannuation Payments

Payer: Microbase Asia Pacific Pty Ltd

Bank Details for PayTo Agreement:

Payer BSB: Enter BSB Number

Payer Account: Enter Bank Account Number

Maximum Amount per transaction: 1500 \$ 1,500

Payment Cycle: Monthly

Maximum Payments per Payment Cycle: 1

Ozedi Holdings Pty Ltd (ACN 167 142 672) ("Ozedi") is a corporate Authorised Representative (number 1306064) of Amplius Global Pty Ltd (ACN 162 631 326), the holder of Australian Financial Services Licence number 505929.

I have read and accept the terms and conditions

Submit To My Bank For Approval

Settings

Site details Database settings Accounts Local settings Online settings

Default parts and services accounts

Parts - Income: Parts

Parts - COGS: Cost Of Goods Sold

Services - Income: Labour

Default payment accounts

| Media Type | Account |
|-------------|-----------------|
| Cash | |
| Cheque | |
| Credit Card | |
| Direct | Trading Account |
| EFT | |
| Online | |

Banking details

Account name: Microbase Asia Pacific

Bank: Anz

BSB number: 016454

Account number: 300077077

Bank UID: Bank code:

Link to account: Trading Account

Tax

Default tax code: GST

PAYG instalment percent: 0.00 %

Tax included by default

PAYG instalment amount: \$0.00

Default payroll payment

Media: Online Account: Trading Account

STP

STP enabled

SSID: 2203451018

Credit card surcharges

Manage...

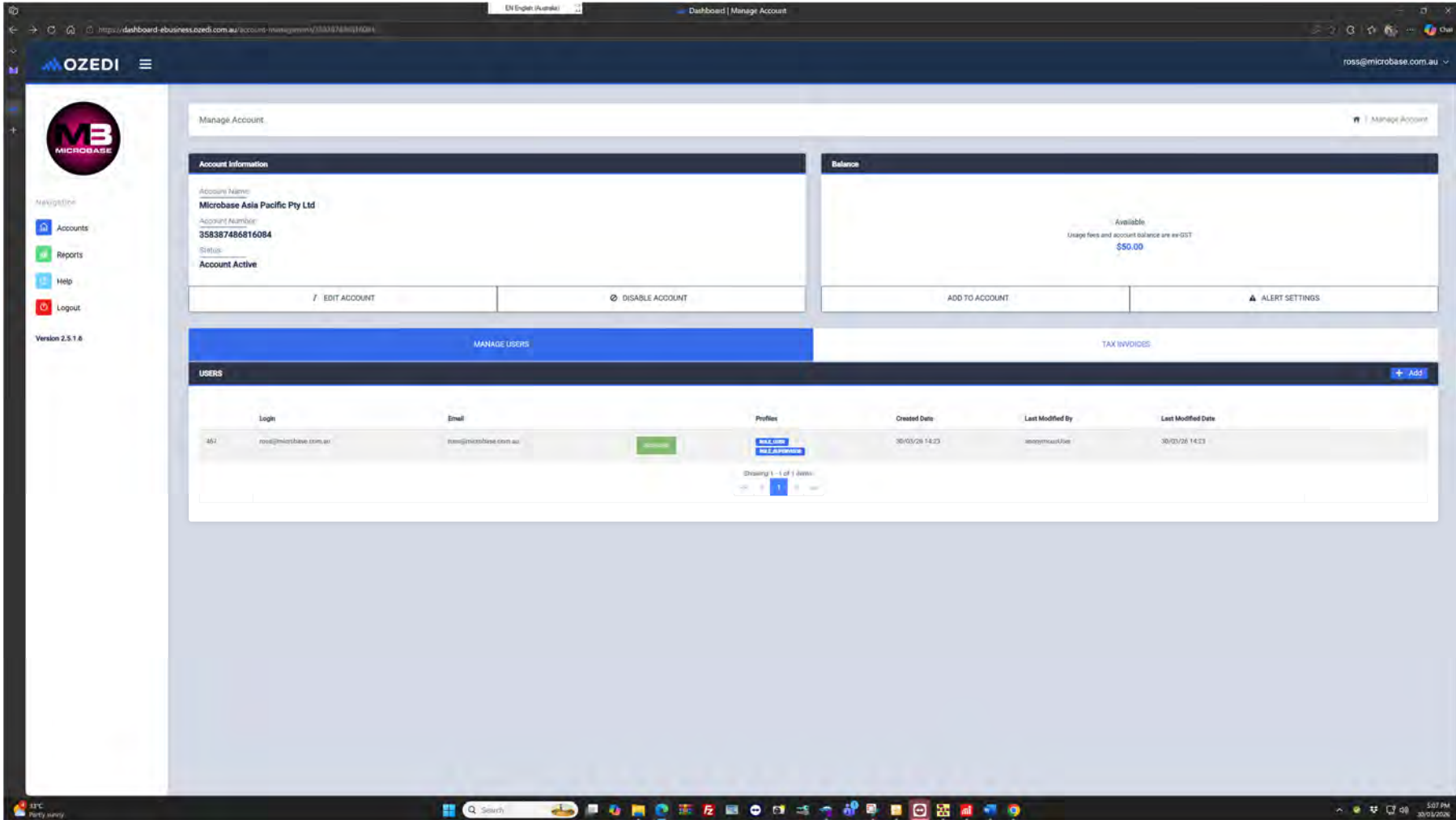
Entitlement calculation

365 days

Enter your details into the authorisation form from the OZEDI dashboard. In Automation go to File / Site Settings / Accounts > Default Payment Settings ... Ensure that the **direct** option is pathed to the account you wish to debit for superannuation payments > Banking Details ... **Enter the same bank account details that you submitted to Zepto**, there is no requirement to complete the Bank UID and Bank Code field.

Finally, you need to create another user so Automation can integrate with your OZEDI account

Creating An Additional ROLE_API Account



From your dashboard select MANAGE USERS + ADD

User Page User Page

First Name

Last Name

Email

Select User Role

OZEDI Dashboard Access External App Access (API)

[Add User](#)

You can use the administrators name, please be aware you must use an alternate email address to the main account, select the EXTERNAL APP ACCESS (API) option for this user.

MANAGE USERS TAX INVOICES

USERS [+ Add](#)

| Login | Email | Profiles | Created Date | Last Modified By | Last Modified Date |
|-------|--------------------------|---|----------------|-----------------------|---------------------------------------|
| 467 | ross@microbase.com.au | Activated ROLE_USER ROLE_SUPERVISOR | 30/03/26 14:23 | anonymousUser | 30/03/26 14:23 |
| 468 | microbase@protonmail.com | Activated ROLE_API | 30/03/26 17:11 | ross@microbase.com.au | 30/03/26 17:11 Delete |

Showing 1 - 2 of 2 items.

Now in your dashboard you will see a second user with an ROLE_API profile, these credentials allow Automation to pass information to your OZEDI account.

Finally, you will receive two emails, one confirming the creation of the prime account and a second confirming the addition of a ROLE_API account that will be sent to the secondary email address.

The primary client account confirmation, this includes the **client identifier** you are required to enter into Automation Premium.

Dear Ross@microbase.com.au

Your client account has been created, please use the following identifier within your Payroll Software to be able to use the service for:

Service : Microbase Asia Pacific Pty Ltd Account 5,SS

Client Identifier: 5968897582

Regards,

OZEDI Support Team.

The second email that is sent to the alternate address will have a link prompting you to reset your password for the **new user** by clicking on the link provided.

Dear microbase@protonmail.com

Your b2bhub account has been created, please click on the URL below to access it:

<https://dashboard-ebusiness.ozedi.com.au/reset/finish?key=99wgYCIZYPCW3DBB1jv>

Regards,

OZEDI Support Team.

Enter a password & select Reset Password

Again select login

Sign In using your original password NOT the secondary

Note: If you wish to open the secondary user account you will need to use the secondary email address and password.

When you have completed the described steps, you are ready to link Automation payroll to your OZEDI account, to do this you need the following information:

Second Account Email (ROLE_API)

OZEDI Password For The Second Account's Email

Account Number (Available from your OZEDI dashboard)

Client ID (Available from the account creation confirmation email)

Support

Microbase Asia Pacific Pty Ltd is responsible for delivering the data from Automation in a form that can be processed via the OZEDI platform. If you encounter any errors while transferring data through the Automation gateway then please use our support services. However, be aware **we are not responsible for the operation or account setup via the OZEDI dashboard**, for advice on the initial account setup you will need to contact the OZEDI help desk.

Support line: [1300 737 614](tel:1300737614)

Email: support@ozedi.com.au

Payday Check List

Payday Super Checklist Link, this information is provided by the Australian Taxation Office

[n75797 \[DE-77714\] - Payday Super - Employer checklist - fact sheet.pdf](#)