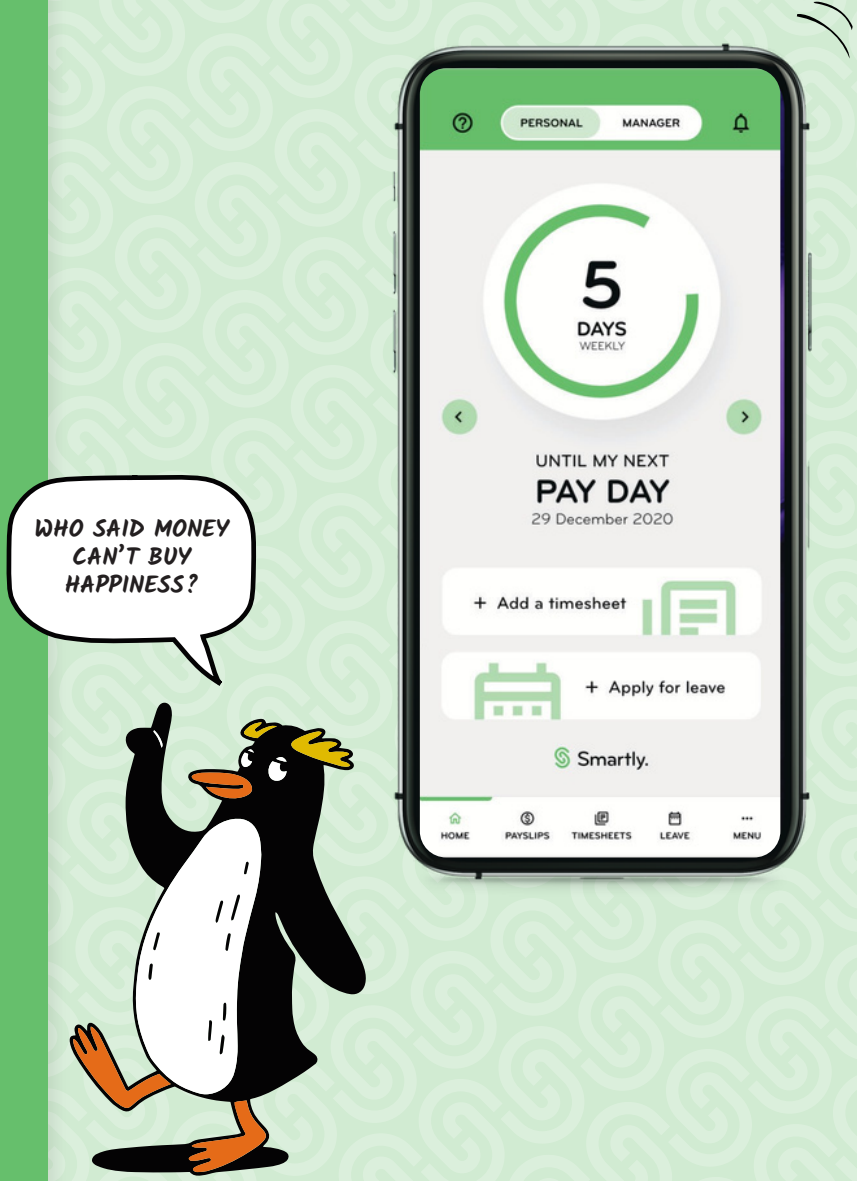
Smartly.

Get paid, the Smartly way.

A complete guide to using the Smartly mobile app.



www.smartly.co.nz

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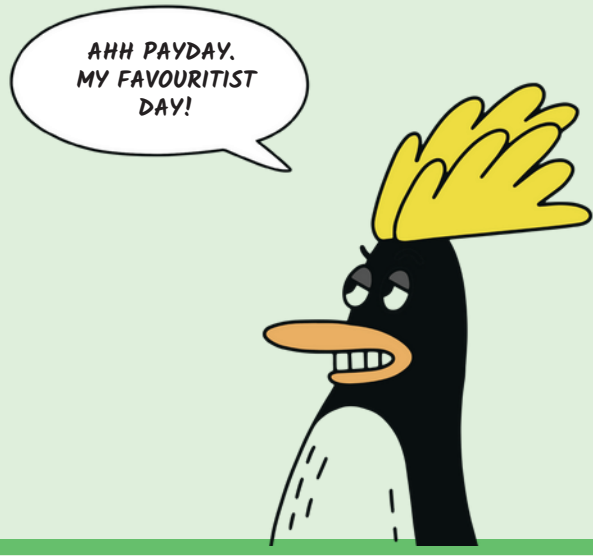


Getting started

Your username and password

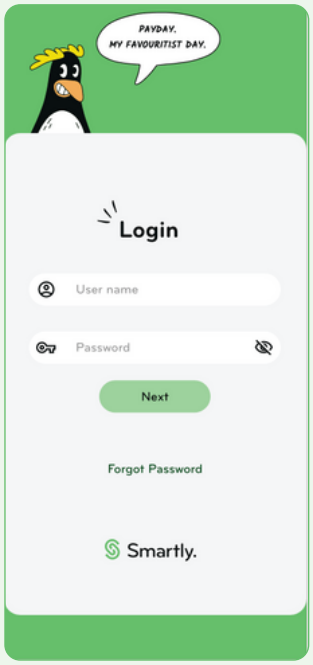
When your employer sets you up on the Smartly app, you'll get an email to set up your password. Your employer will need to let you know what your username is.

Downloading and logging in

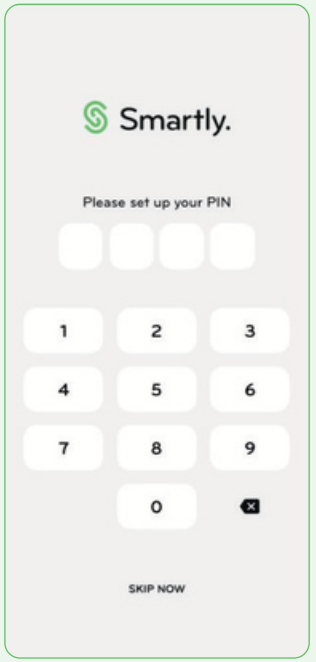
You can download the Smartly app from the Apple or Google Play Stores. Supported mobile versions include:

- iOS - 12.0 or later.
- Android - version 8.0 or higher.

How to set up your PIN

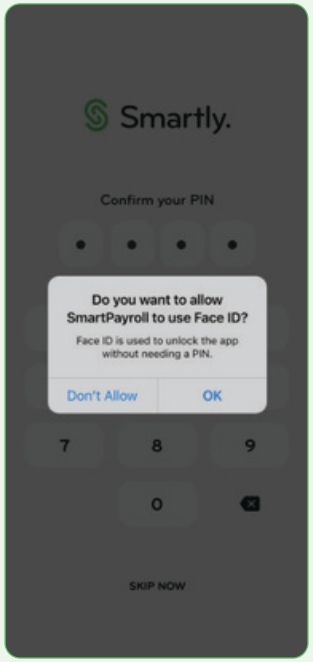


1. Once you've downloaded the app, enter your user name and password.



2. The first time you log in to the mobile app, you'll be prompted to create a PIN, so you don't need to put in your username and password each time you want to use it.

   Skip now to bypass this step.



3. If your mobile device is biometric compatible, once you've confirmed your PIN, a pop-up message will appear asking you if you want to enable biometrics. It will use whatever is set as the default on your device – face or fingerprint ID.

Getting started

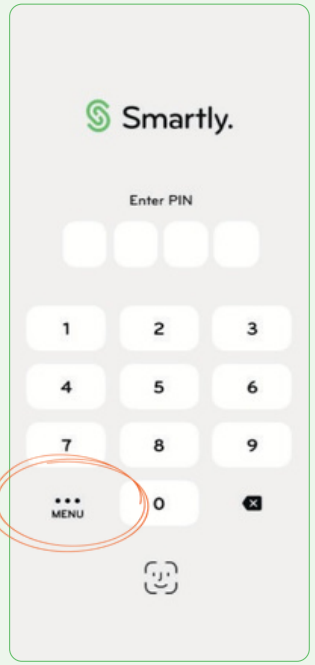
Resetting your mobile PIN

If you ever forget your PIN, resetting it is easy! The Forgot PIN function will send you back to the main login screen. You will sign in again using your username and password before you are prompted to set up a new PIN.

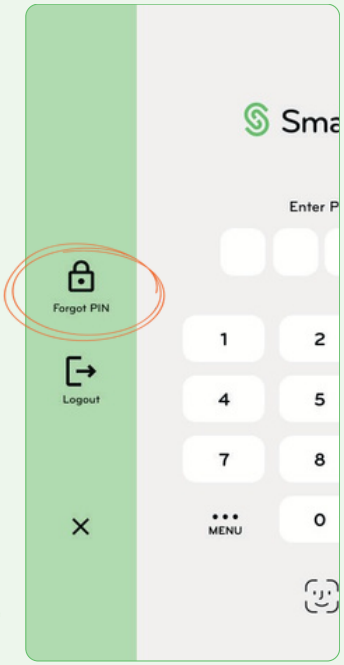
Resetting your password

If you forget or want to change your password, tap on Forgot password to get an access code to reset it.

Reset your PIN

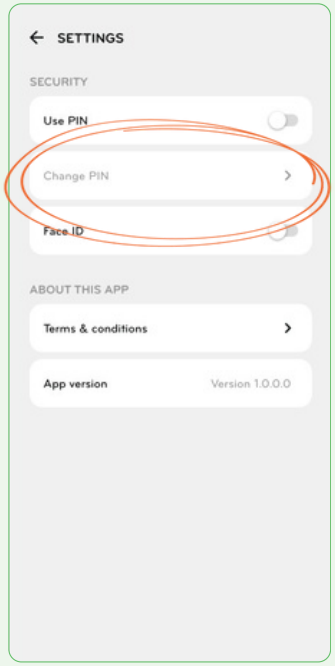


1. Tap Menu and a sidebar will appear.



2. Tap Forgot PIN and follow steps 1-3 on page 3.

Change your PIN



3. You can change your PIN at any time under Settings.

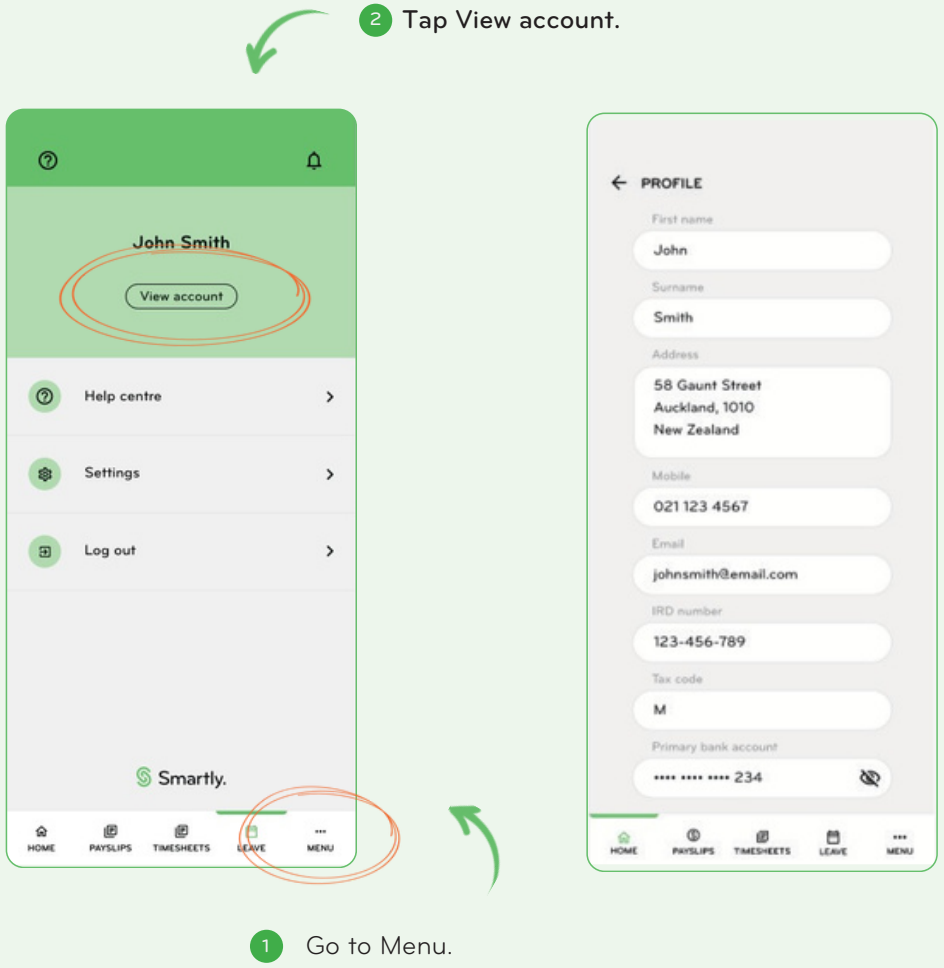
Getting started

Your personal information

Your personal information is entered by your organisation's payroll administrator, and you can easily view this at any time.

If you need to update your contact information, bank account or tax code, you will need to contact the person who manages your pay.

How to view your profile



Payslips

You can access your pay information at any time in Payslips.

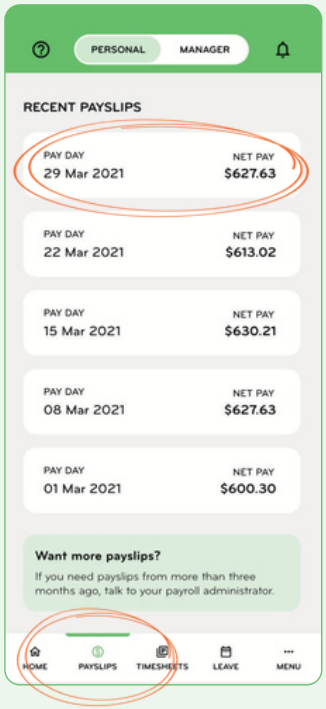
Viewing your payslips

In the app, you can see your payslips from the last 3 months.

To view anything older than that, you'll need to talk to your payroll administrator.

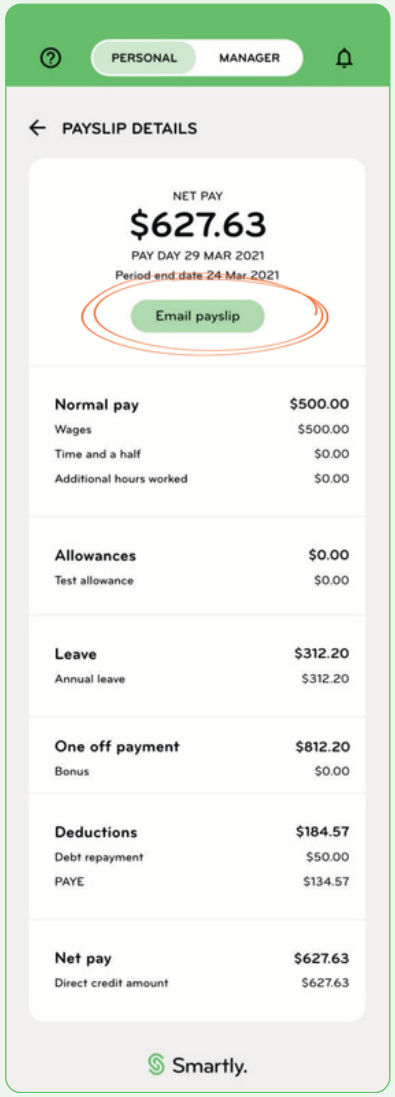
You also have the option to send yourself a copy to your email address that is linked to your account.

How to view your pay details



1 To see a list of all your recent pays, tap Payslips.

2 Tap a pay to see your pay details.



3 Tap Email payslip to send a PDF version to your inbox.

When you choose a payslip to display you'll see a breakdown on screen of your pay for that period including:

- wages and PAYE
- any overtime worked
- any leave taken
- any bonuses or deductions.

Managing your leave

Applying for leave

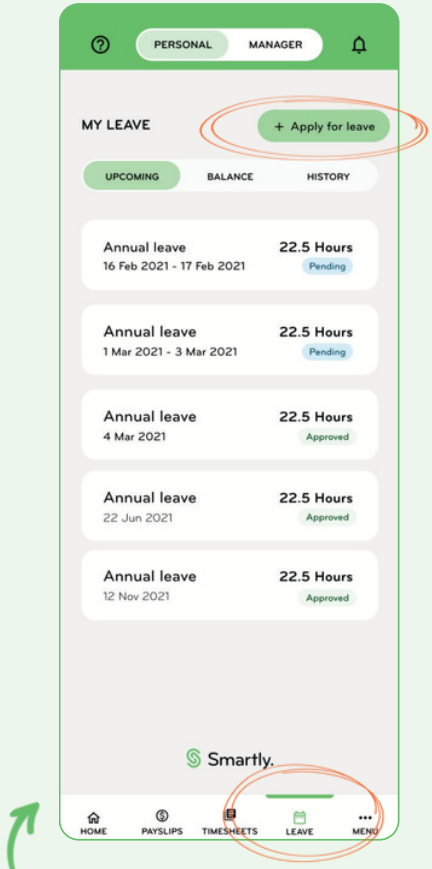
You can easily apply for leave from the homepage or leave section.

After you've submitted a request for approval, it will show as Pending and remain in the Upcoming screen until it has been paid. It will then move to History.

When your manager has approved or declined the request, the status will update.

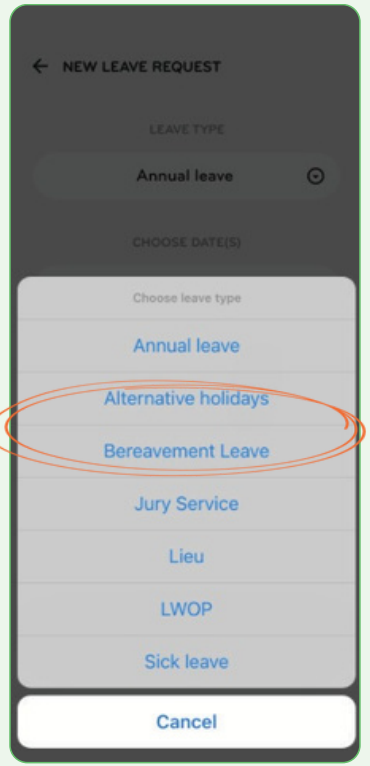
Follow steps 1-3 to create a leave request.

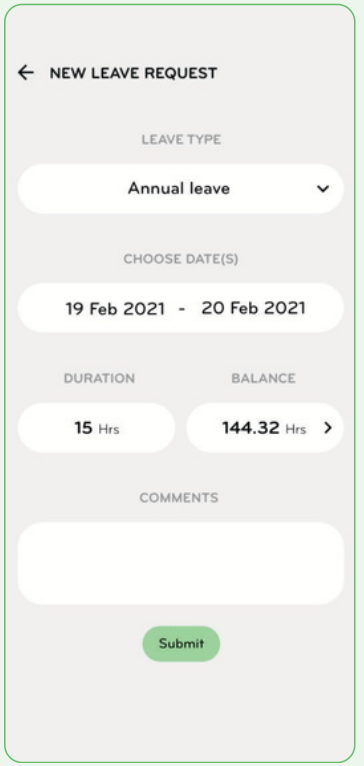
How to apply for leave



1 Tap Apply for leave.

2 Choose your leave type from the drop-down list.





3 Choose your start and end dates. The Duration field will prefill with the total number of hours and update your leave balance. Enter any comments and tap submit.

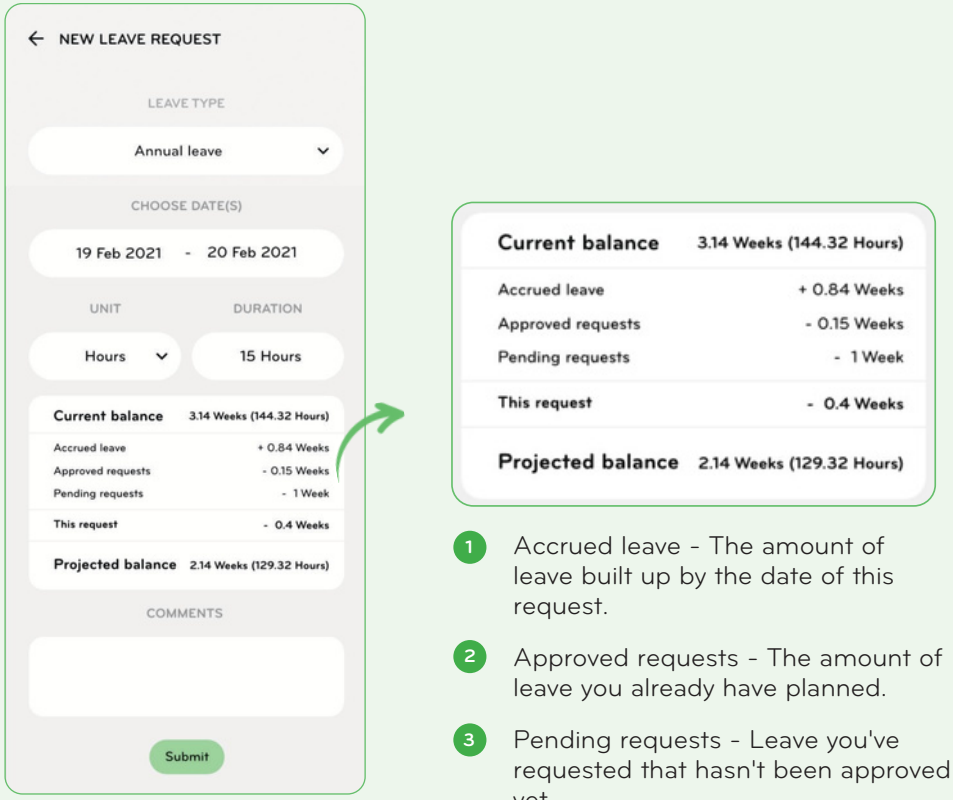
Managing your leave

Future leave balances

You'll also see your future leave balances when applying for leave.

These balances adjust based on the values you enter and will help you when planning time off.

Viewing your future leave balances



1. Accrued leave - The amount of leave built up by the date of this request.
2. Approved requests - The amount of leave you already have planned.
3. Pending requests - Leave you've requested that hasn't been approved yet.
4. Projected balance - The amount of leave you'll have left at the end date of this request after all approved and pending requests have been taken into account.

Managing your leave

Viewing your leave

The leave section defaults to the Upcoming screen.

You can see the type(s) of leave you've requested, the dates and number of hours you'll be taking and whether it has been approved or declined, or is still pending.

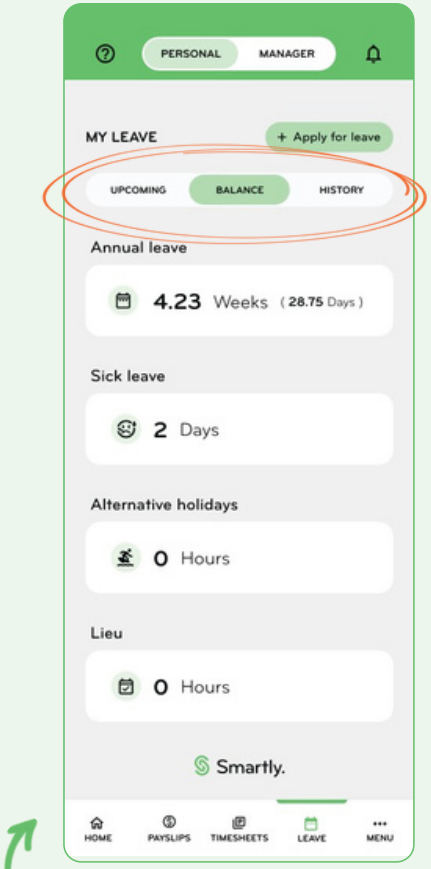
Your history and balances display on different screens which you can move between by using the tab option across the top.

Edit or withdraw an existing leave request

To edit or withdraw a leave item that you've submitted for approval follow steps 1-3.

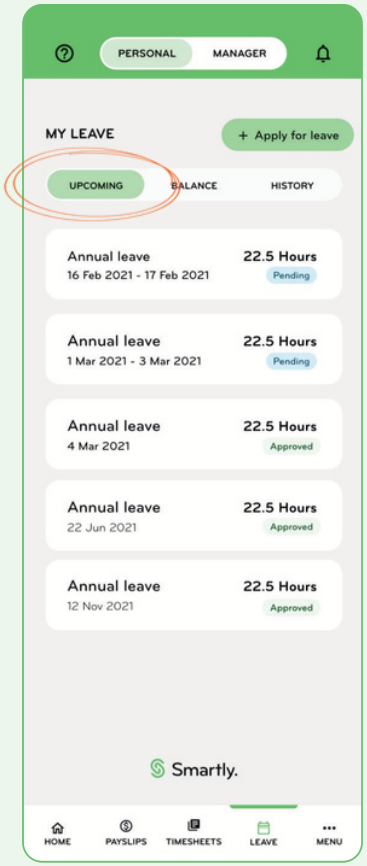
Note: You cannot edit withdrawn, declined, approved or completed leave. You can withdraw approved leave and re-submit if required.

Viewing your leave

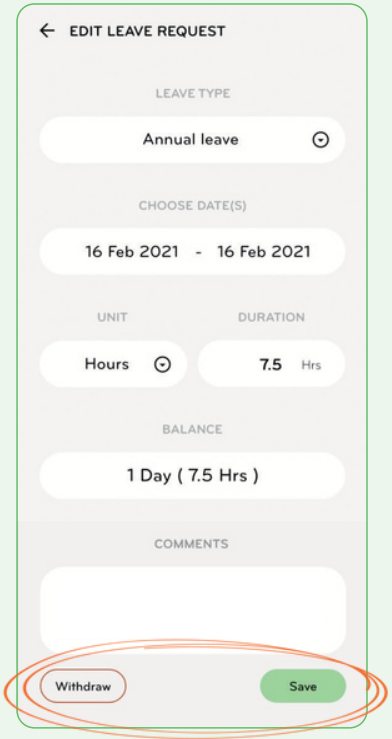


1. Use the tabs to move between the different leave screens.

How to edit or withdraw leave



1. Tap a Pending leave item from the Upcoming screen.



2. To edit, update the relevant details and **tap Save.**

3. To withdraw the request, tap **Withdraw.**

Timesheets

General information

The Timesheets section defaults to an Active screen where you can see a list of your timesheets that are yet to be processed by payroll. These can be in one of four states:

- Draft - Draft - you can continue to make updates until submitted.
- Submitted - Submitted - sent to your manager and can't be edited.
- Approved - Approved - approved by your manager and can no longer be edited.
- Declined - Declined - rejected by your manager and can be edited so you can resubmit.

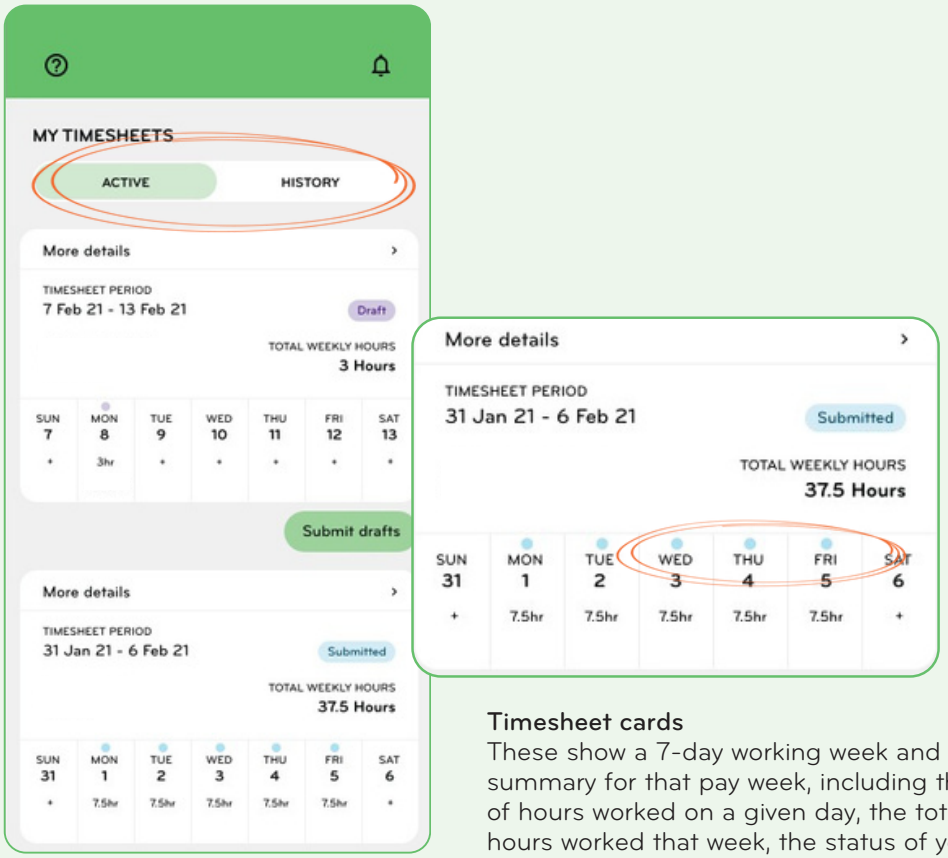
Time entries can be added to any active timesheet no matter what the status is.

New timesheets will appear on the day your new pay week begins.

All completed timesheets will automatically move to History once they've been paid.

Understanding your timesheets

Move between Active and History to see your unpaid vs paid timesheets.



These coloured dots show the status of your time entries for that day.

Timesheet cards
These show a 7-day working week and give you a summary for that pay week, including the number of hours worked on a given day, the total number of hours worked that week, the status of your daily time entries and overall timesheet.

If you get paid monthly, days that fall into a different pay period will be greyed out and can't be edited in this timesheet.

Timesheets

Adding time entries

To add a new entry to a timesheet, follow steps 1-3.

As you're adding your time entries, they will stay in draft until you submit them.

When you submit your timesheet, all your draft time entries for the pay week will be sent to your manager for approval.

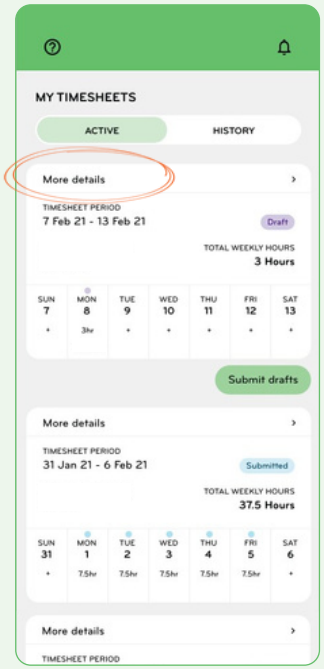
You can only edit draft or declined time entries. See step 4.

Costing your hours worked

If you see a Costed to field in your time entry screens, your employer tracks labour costs across the business.

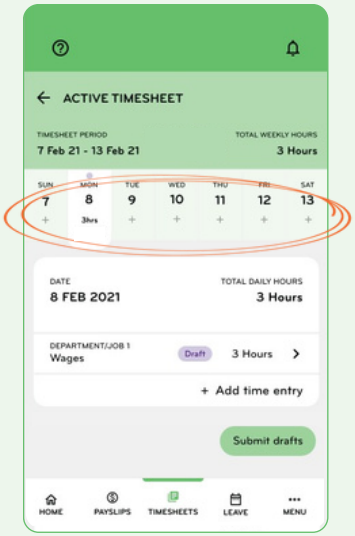
Talk to your manager or payroll administrator about how you should be correctly using this feature.

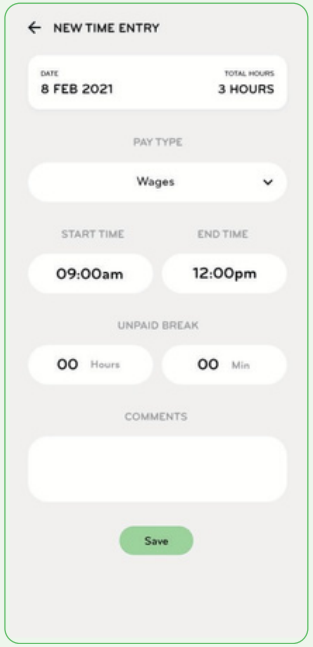
How to add and edit a time entry



1 Tap More details or a day of the week.

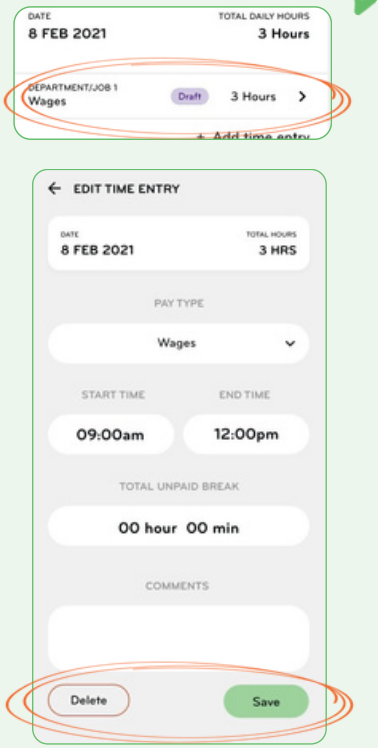
2 Choose the day you want to enter your time entry for and tap Add time entry.





3 Your app will pre-populate with data from your last timesheet. Edit your pay type, start and end times, any unpaid breaks and comments as required. Tap Save.

4 To edit, tap an entry, update and tap Save. You can also delete an entry from the edit screen as well.



Timesheets

Copying a previous timesheet

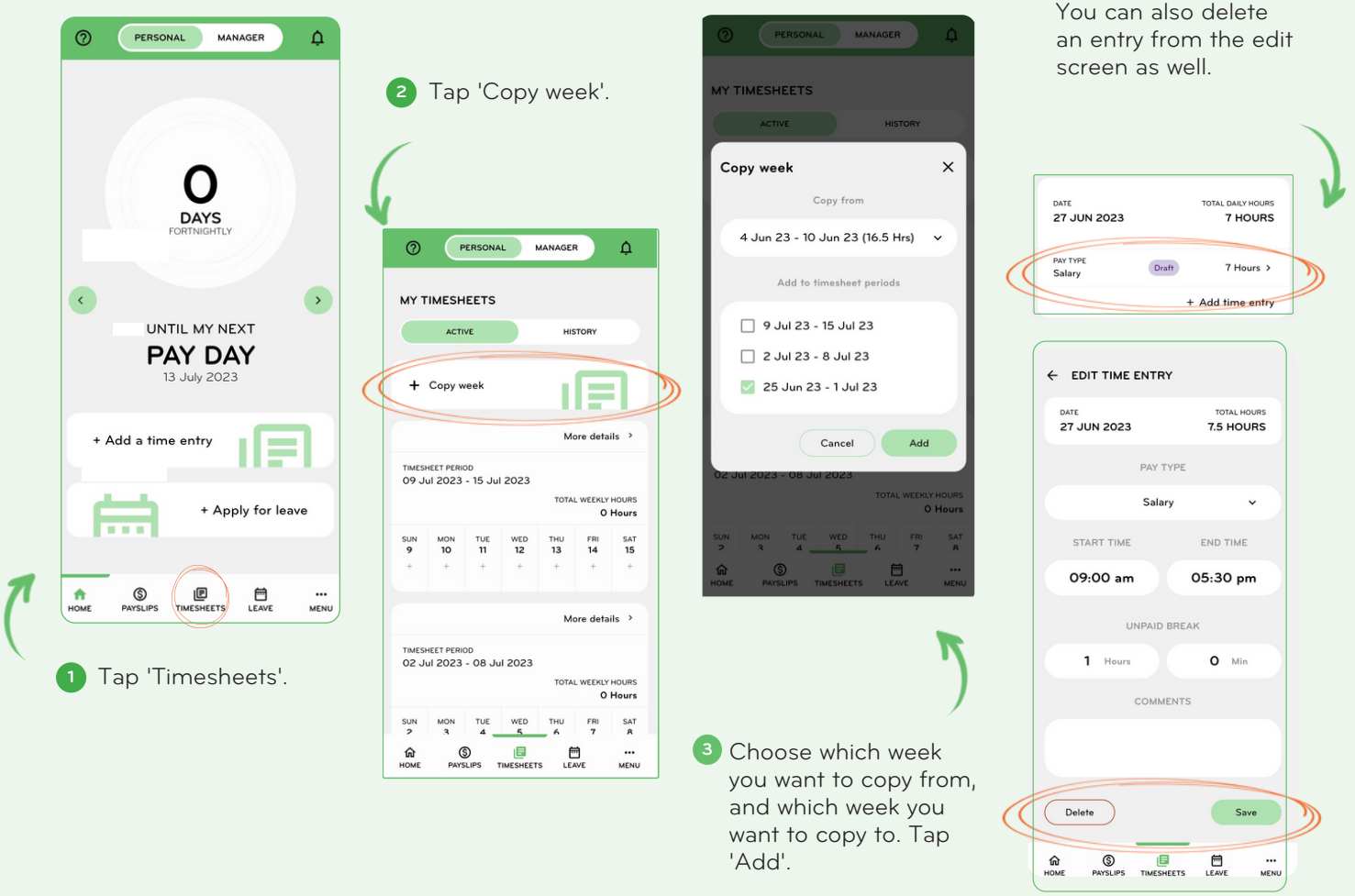
If you have worked the same or similar hours as another week, you can copy that timesheet over.

See Steps 1-4

Note:

If you've been set up with the ability to cost hours to departments, projects or jobs, please make sure this field is correctly filled in before submitting.

How to copy and paste a previous timesheet



Manager view

Personal vs manager view

If you're a manager responsible for approving leave and timesheets for your team, you will also have a manager profile which is accessed through the same login.

When you switch views, the bottom navigation will change and Payslips will disappear. You will no longer be able to see any of your own leave or timesheet information until you switch back to **Personal.**

Leave approvals

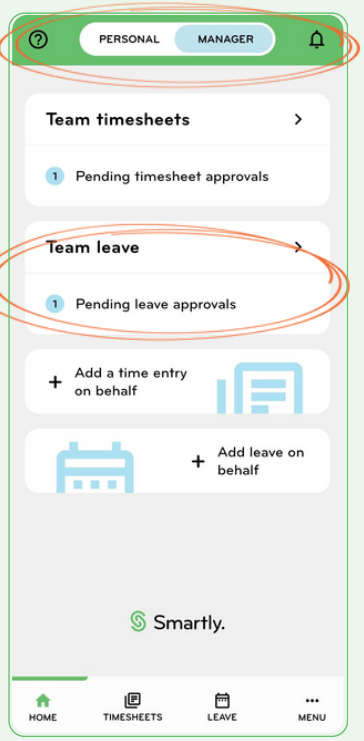
The leave section defaults to a pending view listing all requests you need to action.

Each item shows the name of the person requesting leave, the dates they'd like to take, what type of leave it is and the total number of hours.

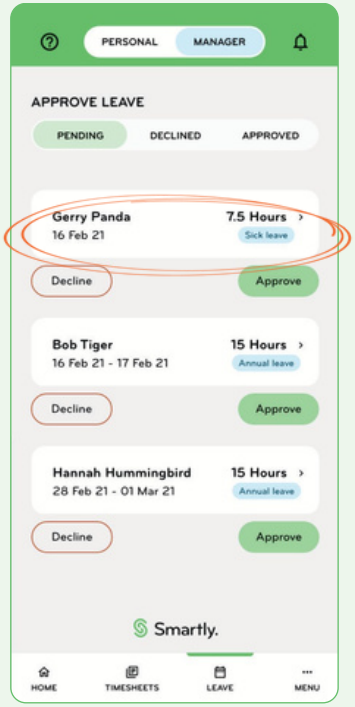
You can see more detail when you tap a request.

How to approve and decline leave requests

1 To switch to your manager view, tap Manager at the top of your screen. You'll land on the home dashboard where you'll see how many approvals need your attention.



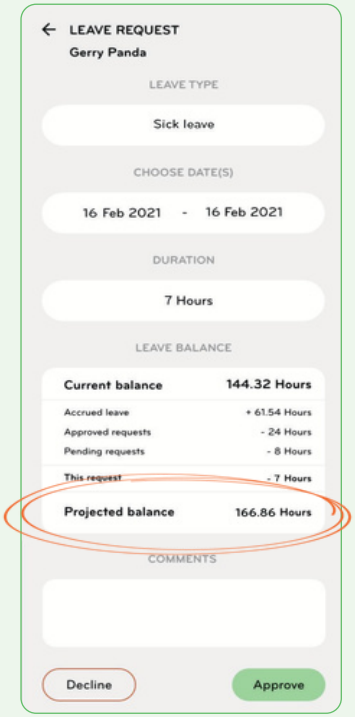
2 Tap Pending leave approvals.



3 You can easily action any requests on the Pending screen, using the Decline or Approve buttons.

Once actioned, the requests will move to the Declined or Approved views.

To view more detail, tap a request.



4 You will also see the employee's leave balance that will remain after their requested leave is taken.

Manager view

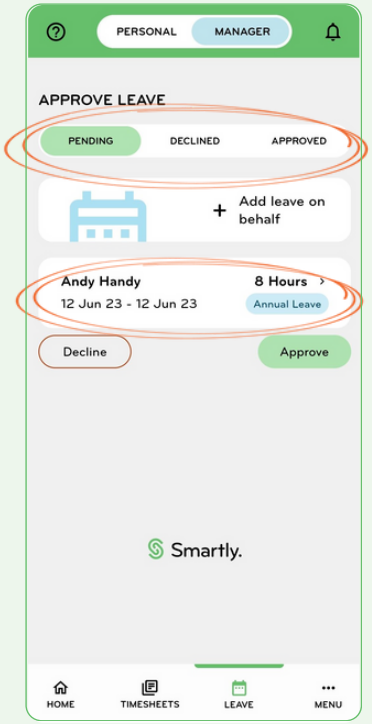
Editing a leave request

If you need to edit a leave request for a staff, you can action this from your app.

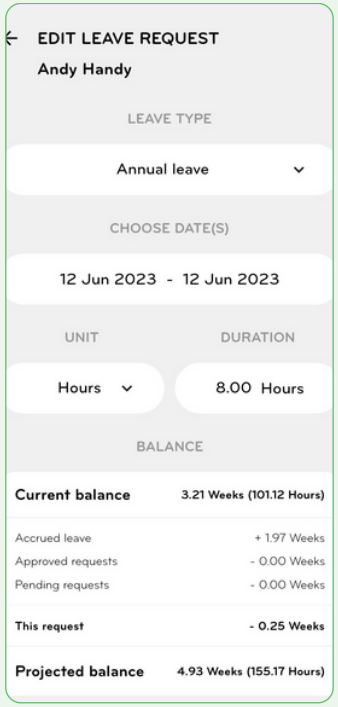
Or you can do this through your Manager's Portal (logging into the Smartly site with the same username and password as you would on your app).

How to edit leave requests

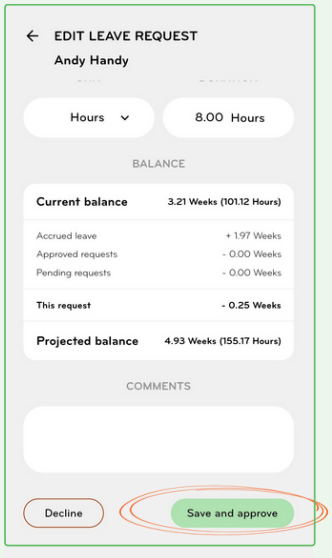
1 Tap on 'Leave'.



2 Navigate to the correct section, eg. 'Pending', or 'Approved', and tap into the selected entry.



3 Make the required changes.



4 Tap 'Save and approve' (for Pending leave) or 'Save' (for Approved leave).

Manager view

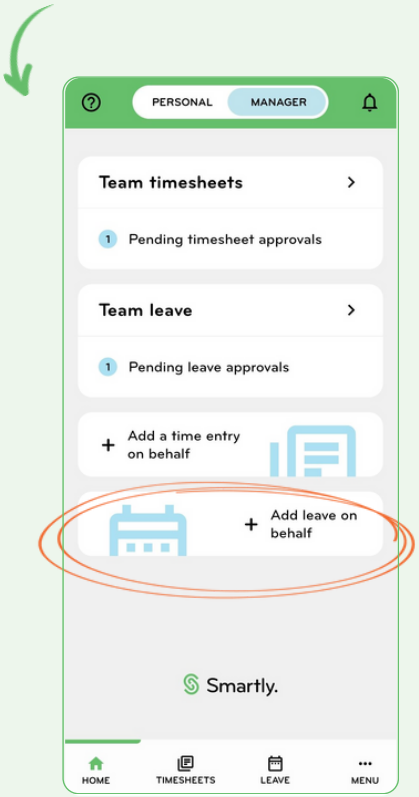
Adding a leave request on behalf of your staff

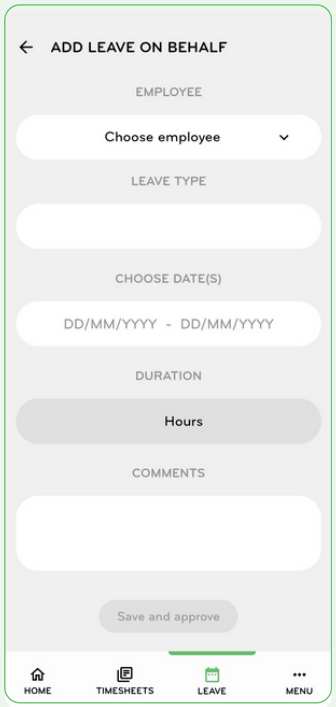
You can add a leave request on behalf of your staff if you know they're taking leave, and have yet to submit a leave request.

Or you can do this through your Manager's Portal (logging into the Smartly site with the same username and password as you would on your app).

How to add leave on behalf of your staff

1 Tap the '+Add leave on behalf' button.





2 Choose the employee and fill out all the required fields. Tap 'Save and approve'.

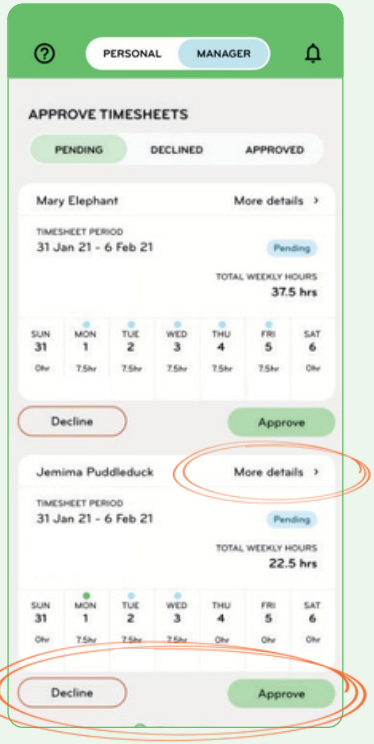
Manager view

Timesheet approvals

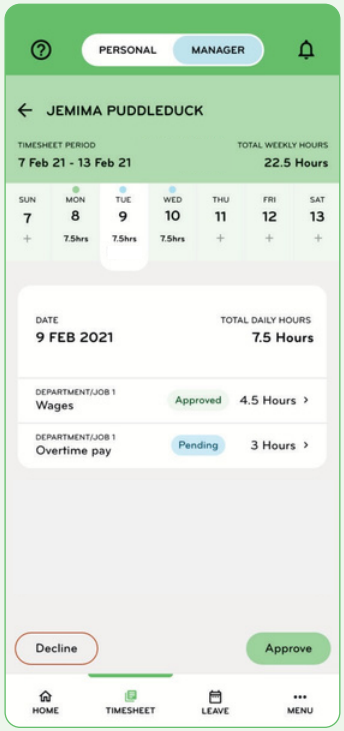
The timesheet section defaults to the Pending screen showing all timesheets that need your attention.

Each one shows the name of the person who submitted the timesheet, their total hours for the pay week as well as a breakdown over the different days.

How to approve and decline timesheets

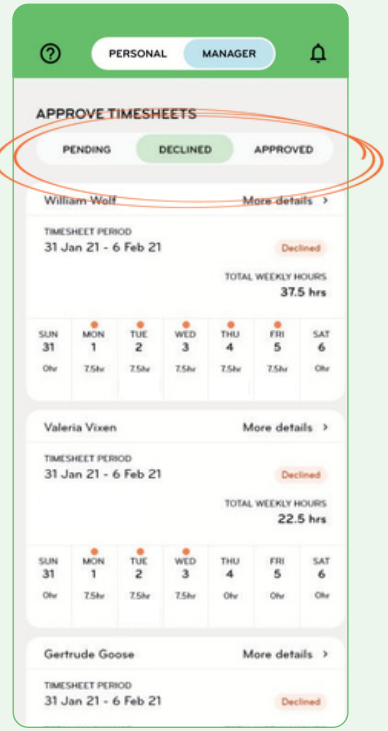


1 You can approve or reject timesheets from the main screen, using the buttons. If you'd like to see more information, tap More details or the day of the week you want to view.



2 You will go to a screen that shows a breakdown of all the time entries for that day and the status of each.

You can also approve or decline the entries from this screen.



3 Once actioned, the request will move to the Declined or Approved screen.

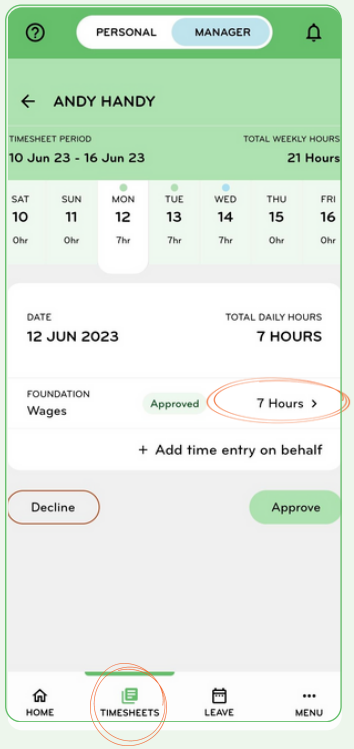
Manager view

Editing timesheets

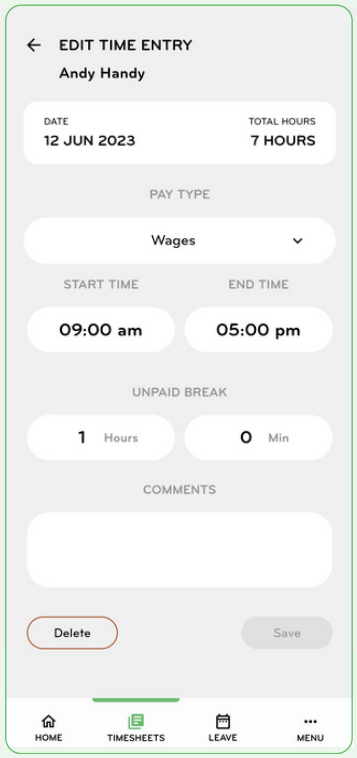
If you need to edit a timesheet entry for a staff, you can action this from your app.

Or you can do this through your Manager's Portal (logging into the Smartly site with the same username and password as you would on your app).

How to edit timesheets



1 To edit a timesheet entry, locate the entry under 'Timesheets' and then tap on the right arrow next to the selected entry.



2 Make the required changes and then tap 'Save'.

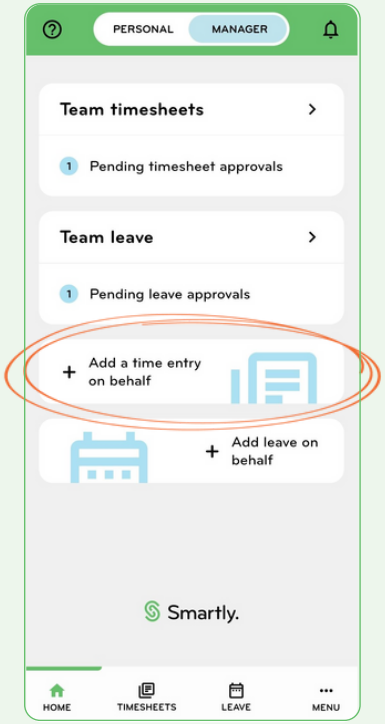
Manager view

Adding a timesheet entry on behalf of your staff

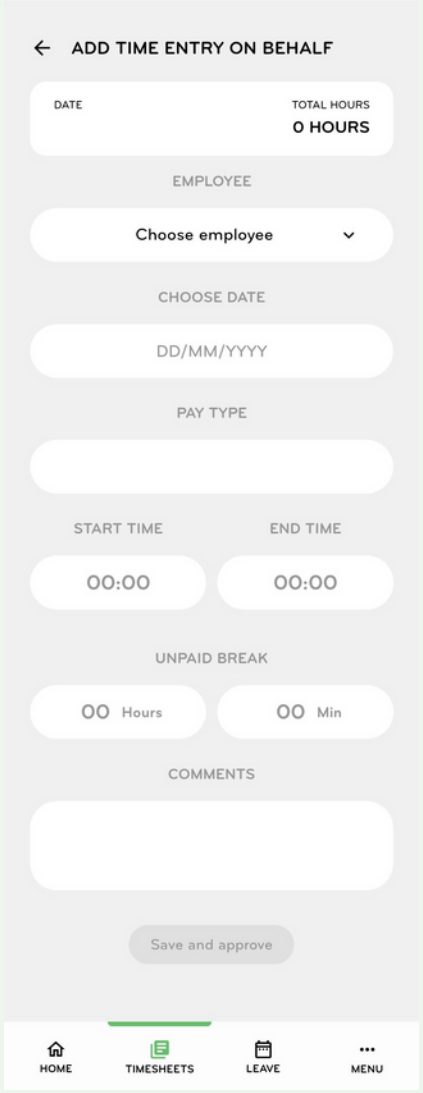
You can add a timesheet entry on behalf of your staff.

Or you can do this through your Manager's Portal (logging into the Smartly site with the same username and password as you would on your app).

How to add timesheets on behalf of your staff



1 To add a timesheet entry on behalf of your staff, tap '+Add a time entry on behalf'.



2 Choose the employee and fill out all the required fields. Tap 'Save and approve'.

We're here to help

If you're an employee, please talk to your payroll administrator and they can get in touch with our helpdesk.

Our customer support team can be reached on 0800 10 10 38, Monday to Friday, excluding public holidays.