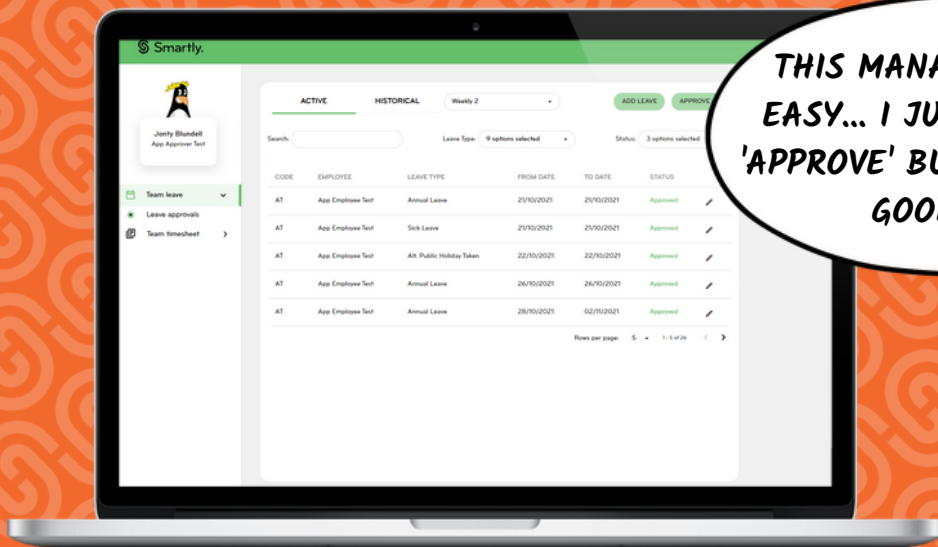




Managing your team, Smartly.

A complete guide to using your managers portal.



THIS MANAGERS STUFF IS EASY... I JUST FLIPPER THE 'APPROVE' BUTTON AND WE'RE GOOD TO GO!





Sort your teams' leave and timesheets from your own managers portal.



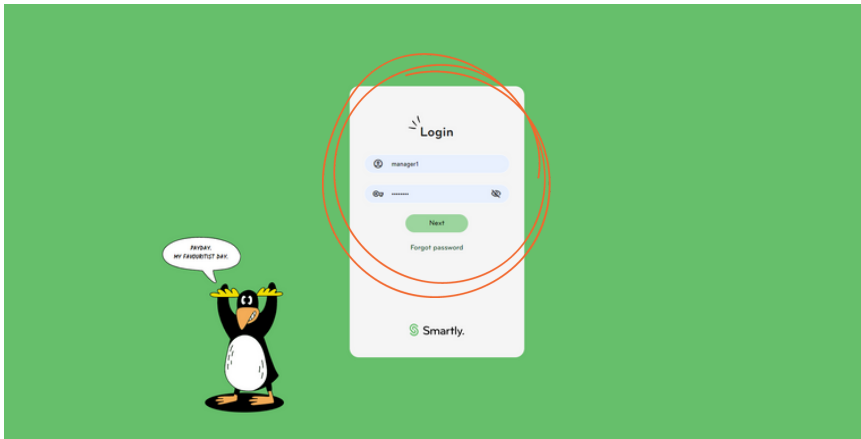
This guide covers:

- Logging in
- Managing your teams timesheets
- Managing your teams leave requests

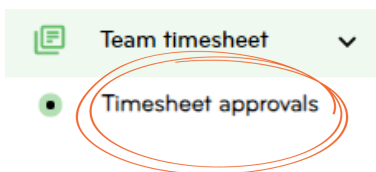
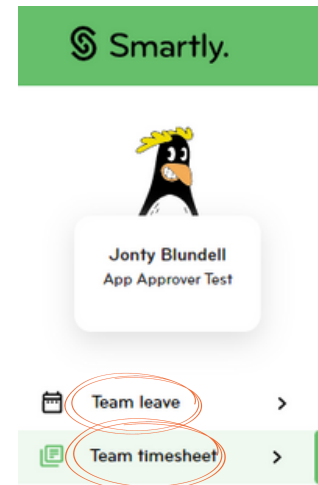
Your managers portal

Logging in.

Your managers portal is found at <https://login.smartly.co.nz>, and you can login with the same username and password that you use for your Smartly app.



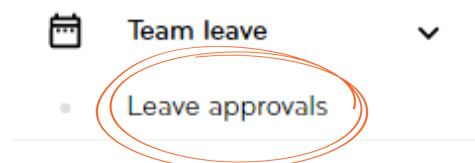
- 1 Once you've logged in, you'll be taken to the Home page.
- 2 In the left hand menu you'll find 'Team leave' and 'Team timesheet'.



- 3 You can access the 'Timesheet approvals' screen by clicking the arrow next to 'Team timesheet'.



- 4 You can access the 'Leave approvals' screen by clicking the arrow next to 'Team leave'.



Your managers portal

Managing your teams timesheets.

- 1 When you click into 'Team timesheet' you'll see 3 tabs, 'Pending', 'Approved' and 'Completed'.



Smartly.

Jonty Blundell
App Approver Test

Team leave >
Team timesheet v
Timesheet approvals

Pending Approved Completed

Search: Weekly

Records per page 10

Employee	Total Hours	Period	Last updated
App Employee Test (AT)	54.00	15th May 2017 - 21st May 2017	3rd Nov 2021
App Employee Test (AT)	31.50	22nd May 2017 - 28th May 2017	4th Nov 2021
App Employee Test (AT)	17.53	29th May 2017 - 4th Jun 2017	8th Nov 2021

Showing page 1 of 1

* Contains non-ordinary pay rates



Pending Approved Completed

Search: All

Records per page 10

Employee	Total Hours	Period	Last updated
App Employee Test (AT)	54.00	15th May 2017 - 21st May 2017	3rd Nov 2021
App Employee Test (AT)	31.50	22nd May 2017 - 28th May 2017	4th Nov 2021
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Showing page 1 of 1

* Contains non-ordinary pay rates

- 2 Under the 'Pending' tab, you'll find all timesheet entries that are waiting to be approved.

- 3 You can 'Approve' or 'Decline' an employees entry by clicking the purple pencil icon.

Timesheet Batch for App Employee Test (AT)

For period 15th May 2017 - 21st May 2017

Date	Start	End	Break(hrs)	Hours	Pay Type	Costed to
Monday, 15th May 2017	07:30	15:30	0.50	7.50	Wages	
Monday, 15th May 2017	07:30	15:30	0.50	7.50	Wages	
Tuesday, 16th May 2017	07:30	15:30	0.50	7.50	Wages	
Wednesday, 17th May 2017	07:00	15:30	0.50	8.00	Wages	
Wednesday, 17th May 2017	07:30	15:30	0.50	7.50	Wages	
Thursday, 18th May 2017	07:00	15:30	0.50	8.00	Wages	
Friday, 19th May 2017	07:00	15:30	0.50	8.00	Wages	

Total: 54.00

Approve Decline



4 You can 'Add' timesheets under the 'Approved' tab.

The screenshot shows a timesheet interface with tabs for 'Pending', 'Approved', and 'Completed'. The 'Approved' tab is selected. Below the tabs, there is a search bar containing 'App Employee Test' and a dropdown menu also set to 'App Employee Test'. To the right of the dropdown is an 'Add entry' button. Below this is a date range selector showing '6 Dec 2021 - 12 Dec 2021' and a 'Today' button. The main area is a grid with columns for days from Monday to Sunday and rows for hours from 08:00 to 21:00. Yellow blocks represent time entries for 'App Employee Test' on Monday and Tuesday, with durations of 09:00-17:00 and 17:00-21:00 respectively.


5 Select the correct employee, and then click 'Add entry'.

This is a close-up of the dropdown menu and the 'Add entry' button. The dropdown menu is open, showing 'App Employee Test' as the selected option. The 'Add entry' button is to its right.

The screenshot shows a form for adding a time entry. The fields are: Employee (App Employee Test), Pay Type (Choose Pay Type), Date (20/12/2021), Time (two input boxes for hh:mm), Break (input box for hours), Duration (hours), Costed To (North Island), and Comment (text area). At the bottom are 'Save' and 'Cancel' buttons. A green arrow points from the 'Add entry' button in the previous screenshot to the 'Employee' field.

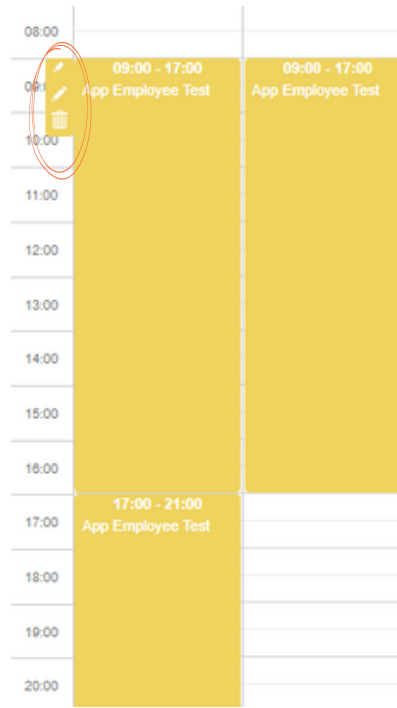
6 Once you click 'Add entry', a pop up will appear. Fill in all the details for the time entry, then click 'Save' once completed.

- 7 You can also 'Edit' and 'Delete' a time entry in the 'Approved' tab. Click on the white pencil icon to edit an approved time entry.

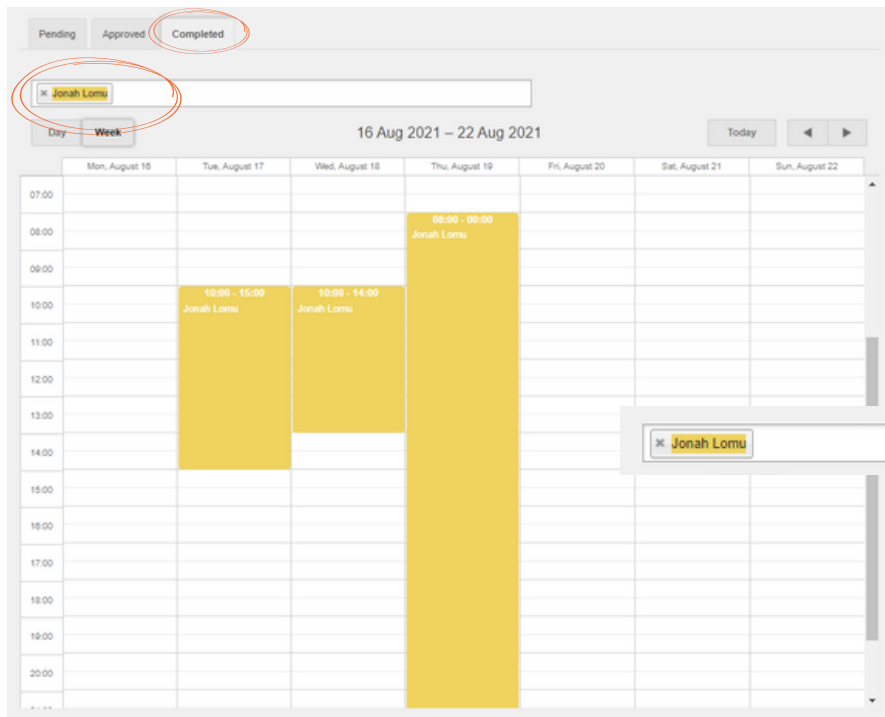
 **Quick tip**

To edit a timesheet entry, you must approve it first. You can then edit it under the 'Approved' tab.

- 8 Or click on the bin icon to delete a time entry.



08:00		
09:00	09:00 - 17:00 App Employee Test	09:00 - 17:00 App Employee Test
10:00		
11:00		
12:00		
13:00		
14:00		
15:00		
16:00		
17:00	17:00 - 21:00 App Employee Test	
18:00		
19:00		
20:00		

Pending Approved **Completed**

✕ Jonah Lomu

Day Week 16 Aug 2021 – 22 Aug 2021 Today

	Mon, August 16	Tue, August 17	Wed, August 18	Thu, August 19	Fri, August 20	Sat, August 21	Sun, August 22
07:00							
08:00				08:00 - 00:00 Jonah Lomu			
09:00							
10:00		10:00 - 15:00 Jonah Lomu	10:00 - 14:00 Jonah Lomu				
11:00							
12:00							
13:00							
14:00							
15:00							
16:00							
17:00							
18:00							
19:00							
20:00							

✕ Jonah Lomu

- 9 In the 'Completed' tab, you'll be able to view timesheet entries that are completed. You can search multiple employees and view all at once, or you can search for a particular employee.



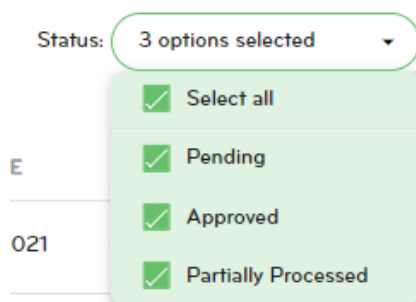
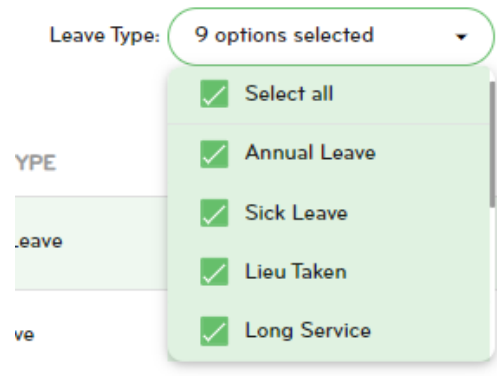
Your managers portal

Managing your teams leave.

- 1 Our 'Leave approvals' section lets you manage your teams leave requests all from one place. You'll be able to approve, decline, edit and add leave on behalf of an employee.

CODE	EMPLOYEE	LEAVE TYPE	FROM DATE	TO DATE	STATUS
AT	App Employee Test	Annual Leave	21/10/2021	21/10/2021	Approved
AT	App Employee Test	Sick Leave	21/10/2021	21/10/2021	Approved
AT	App Employee Test	Alt. Public Holiday Taken	22/10/2021	22/10/2021	Approved
AT	App Employee Test	Annual Leave	26/10/2021	26/10/2021	Approved
AT	App Employee Test	Annual Leave	28/10/2021	02/11/2021	Approved

- 2 You can view all types of leave requests on your 'Leave approvals' screen. Or simply select a leave type you want to view.



- 3 You can also filter your view by the leave status. Select 'Pending', 'Approved', or 'Partially Processed', or simply 'Select all' to view all leave statuses.

- 4 Use the 'Search' section to search an employee name to show their leave requests.

Search:

ACTIVE HISTORICAL Weekly 2

ADD LEAVE APPROVE ALL

Search: Employee Leave Type: 9 options selected Status: 3 options selected

CODE	EMPLOYEE	LEAVE TYPE	FROM DATE	TO DATE	STATUS	
AT	App Employee Test	Annual Leave	15/08/2021	26/08/2021	Approved	
AT	App Employee Test	Annual Leave	21/10/2021	21/10/2021	Approved	
AT	App Employee Test	Sick Leave	21/10/2021	21/10/2021	Approved	
AT	App Employee Test	Alt. Public Holiday Taken	22/10/2021	22/10/2021	Approved	
AT	App Employee Test	Annual Leave	26/10/2021	26/10/2021	Approved	

Rows per page: 5 1 - 5 of 26

5 To open and edit a leave request, click on the pencil icon.

6 A pop up will appear that allows you to edit, save or decline the employees leave request.

Leave Request for App Employee Test

Approved by App Approver Test

Leave Type: Annual Leave

Leave Date: From 15/08/2021 To 26/08/2021

Days: 11

Hours: 0

Leave Available After Request: 17.18 weeks (600.97 days)

Status: Approved

Comment: [text area]

Pay Now:

SAVE DECLINE



Quick tip

Under 'Leave Available After Request', you can see how much leave your employee will have once their leave is approved.

Plus, you also have the option to 'Pay Now'. This option will put the leave into the current pay period, otherwise it is added into the pay period it relates to.

ACTIVE HISTORICAL Weekly 2

ADD LEAVE APPROVE ALL

Search: Employee Leave Type: 9 options selected Status: 3 options selected

7 To add a new leave request, simply click 'ADD LEAVE'.

8 A new leave request will pop up on the screen.

9 Fill in the information for the request, then click 'SAVE'.

Add new leave request

Employee: Test App Employee

Leave Type: Annual Leave

Leave Date: From 20/12/2021 To 21/12/2021

Hours: 7.5

Leave Available After Request: 18.85 weeks (5934.77 hours)

Comment:

Pay Now

SAVE CANCEL

10 Approve the leave request by clicking on the pencil icon and selecting 'Approve'.

AT	App Employee Test	Annual Leave	21/12/2021	23/12/2021	Pending	
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Quick tip

You can approve all pending leave requests by clicking 'APPROVE ALL'.

Weekly 2

Leave Type: 9 options selected

Status: 3 options selected

ADD LEAVE APPROVE ALL

11 Under the 'HISTORICAL' tab, use the filters to find historical leave for an employee. You can change the pay group, date period, status, leave type and employee name.

ACTIVE HISTORICAL Weekly 2 From 08/04/2016 To 08/04/2017

Search: Leave Type: 9 options selected Status: 3 options selected

We're here to help

For information or answers to simpler questions head to our online help centre. Otherwise, if you've got something niggly or urgent that you want to chat through with an expert – we've got you!

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

