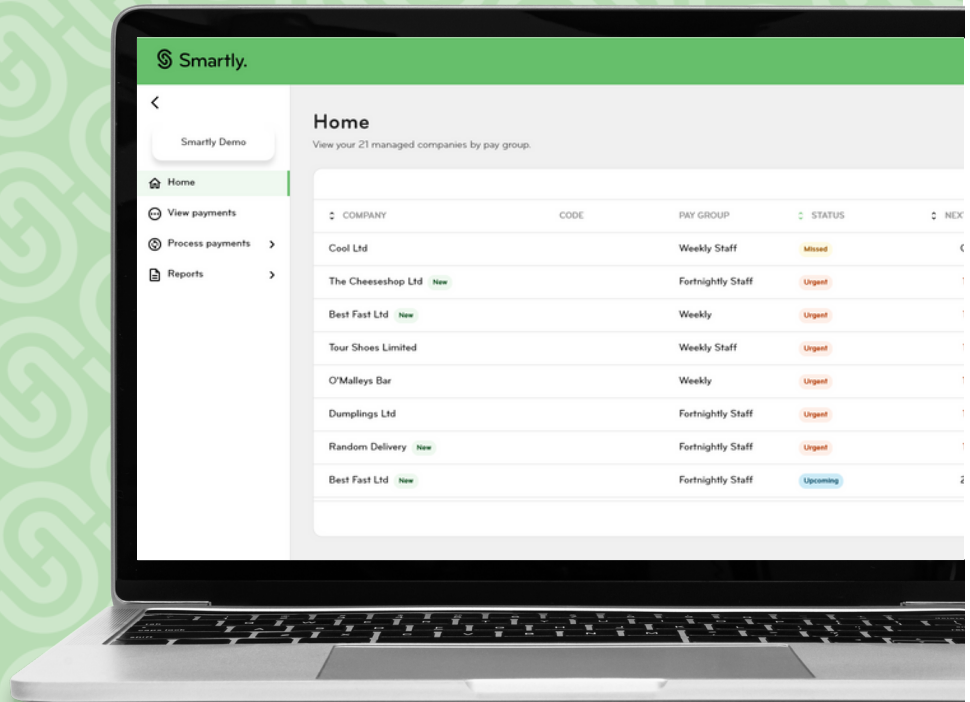




# Guide to using your multi-site view

Your quick overview to managing multiple companies





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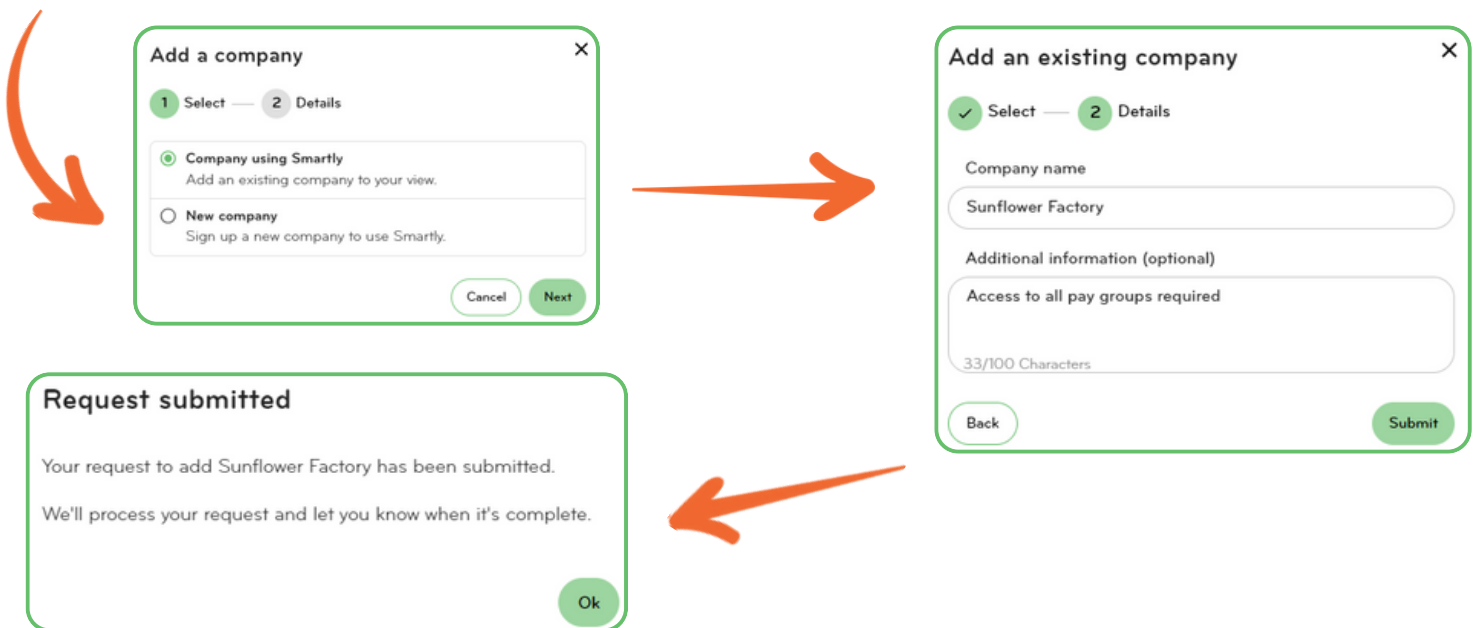
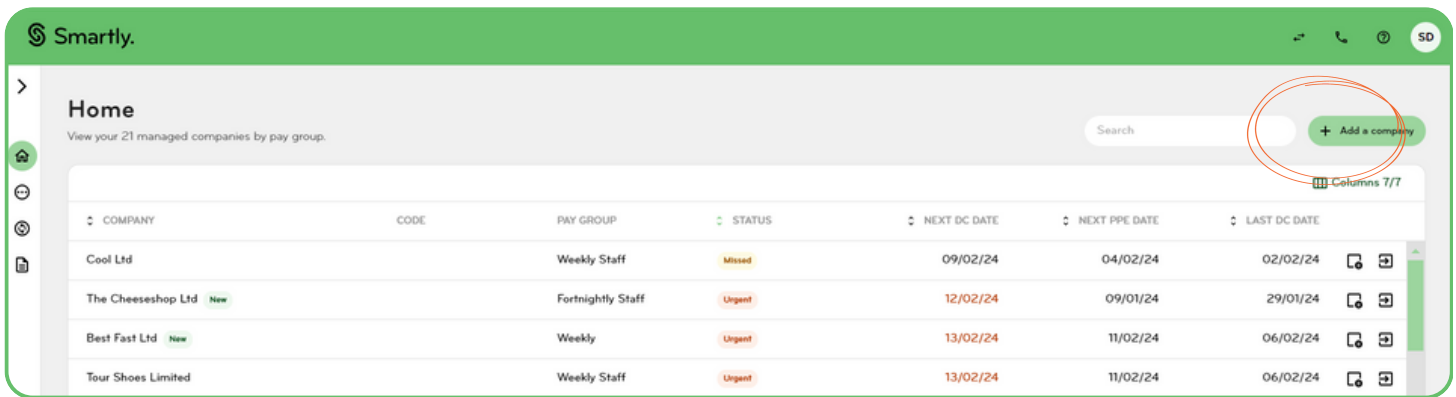
# Adding a company to your multi-site view

Add a company who currently uses Smartly or add a brand new company.

## Add a company who already uses Smartly

- 1 Select 'Add a company'.
- 2 Select 'Company using Smartly'.
- 3 Enter the company name and include any notes.
- 4 Click 'Submit'.

The request will be sent to our Partner Success team to check and add to your multi-site view. Once approved you will see a banner notifying you the new company has been added. A 'new' tag will be added next to the company name on the home page.

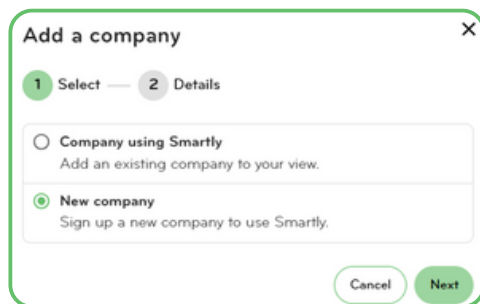


**i** If you are not the main contact for the Smartly site, we will email the company to request permission for you to have access to their company.

## Add a company who is new to Smartly

- 1 Select 'Add a company'.
- 2 Select 'New Company'.
- 3 A new tab will open with our sign up for Smartly page.
- 4 Fill in the required information and click 'Submit'.

Once you have submitted the new company's information, a sales consultant will be in touch to discuss setting the company up with Smartly.



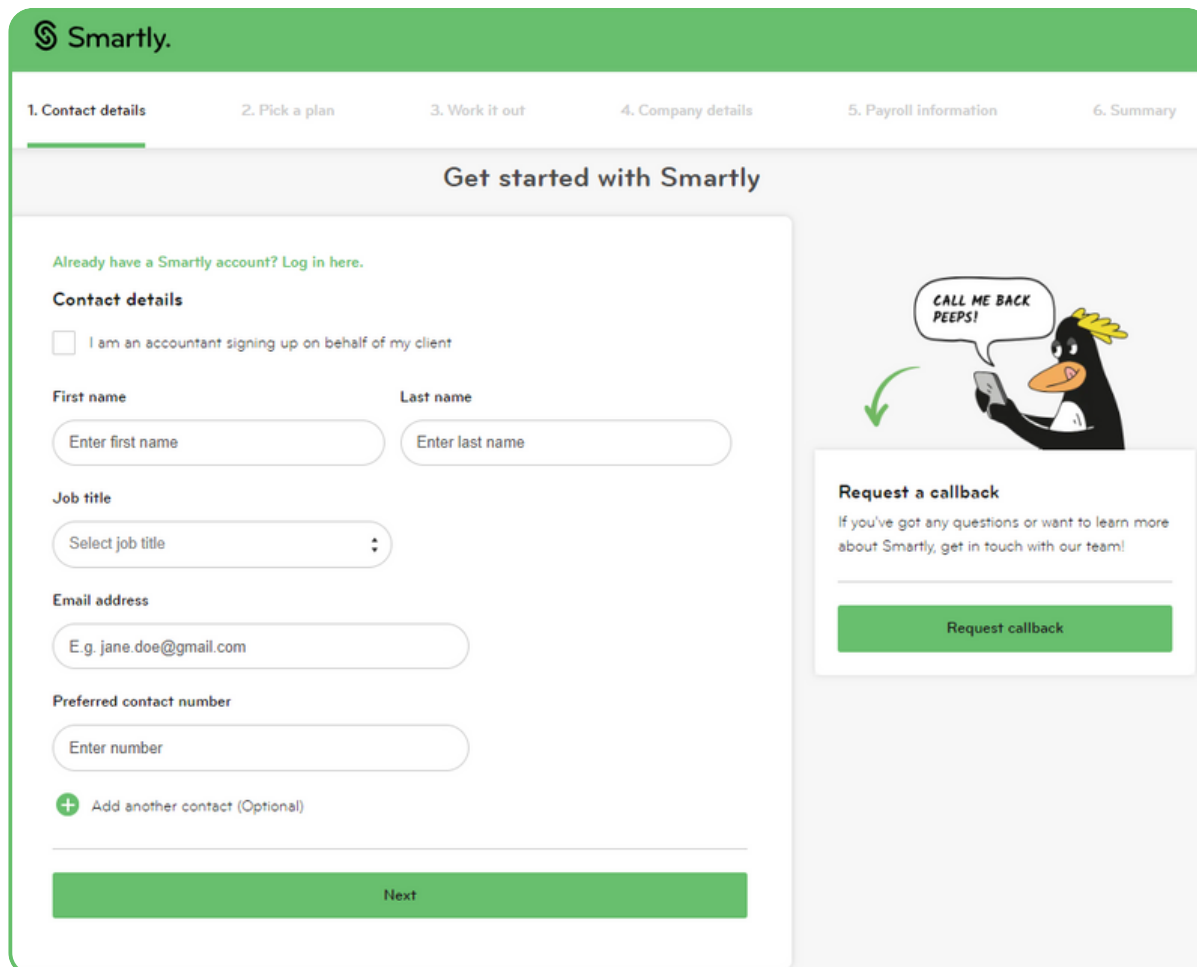
**Add a company** [X]

1 Select — 2 Details

Company using Smartly  
Add an existing company to your view.

**New company**  
Sign up a new company to use Smartly.

Cancel Next



**Smartly.**

1. Contact details    2. Pick a plan    3. Work it out    4. Company details    5. Payroll information    6. Summary

### Get started with Smartly

Already have a Smartly account? [Log in here.](#)

**Contact details**

I am an accountant signing up on behalf of my client

First name:     Last name:

Job title:

Email address:

Preferred contact number:

+ Add another contact (Optional)

Next

**Request a callback**

CALL ME BACK PEEPS!

If you've got any questions or want to learn more about Smartly, get in touch with our team!

Request callback

# Using your multi-site view

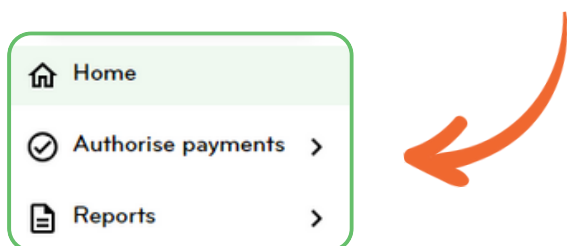
Once you have logged in, this is your homepage. A list of all the companies you work with will be here.

## Homepage navigation

COMPANY	CODE	PAY GROUP	STATUS	NEXT DC DATE	NEXT PPE DATE	LAST DC DATE		
Cool Ltd		Weekly Staff	Missed	09/02/24	04/02/24	02/02		
The Cheeseshop Ltd	New	Fortnightly Staff	Urgent	12/02/24	09/01/24	29/01/24		
Best Fast Ltd	New	Weekly	Urgent	13/02/24	11/02/24	06/02/24		
Tour Shoes Limited		Weekly Staff	Urgent	13/02/24	11/02/24	06/02/24		
O'Malleys Bar		Weekly	Urgent	14/02/24	11/02/24	07/02/24		
Dumplings Ltd		Fortnightly Staff	Urgent	16/02/24	07/02/24	02/02/24		
Random Delivery	New	Fortnightly Staff	Urgent	16/02/24	18/02/24	02/02/24		
Best Fast Ltd	New	Fortnightly Staff	Upcoming	23/02/24	18/02/24	09/02/24		
Speedy PanelBeating		Fortnightly Staff	Upcoming	01/03/24	03/03/24	16/02/24		
Hairdressing Co		Fortnightly Staff	Upcoming	03/03/24	03/03/24	18/02/24		
Travel Services School		Wages	Monthly Staff					
Travel Services School		Wages	Weekly					

- A** Process payments\* - See a list of prepared payments that need authorisation.
- B** Reports - Access a variety of reports relating to payroll.
- C** Company - List of companies you have access to. You can also arrange your view by company name.
- D** Status - Your pay groups will be sorted into the following statuses: Missed, Urgent, Upcoming, Inactive.
- E** Add a company - You can add a company that is already using Smartly or sign a new one up.
- F** Columns - Customise what information you view on the homepage.
- G** Add notes - You can add notes to a pay group or for the entire company.
- H** Login icon - Click the log in icon to access that company's Smartly site.

\*Depending on your multi-site view set-up, you may see the 'Authorise payments' tab instead. However, the functionality remains the same.



## Status

Your pay groups will be sorted into the following statuses: Missed, Urgent, Upcoming, Inactive.

See the appendix for status definitions.

PAY GROUP	STATUS
Weekly Staff	Urgent
Fortnightly Staff	Upcoming

## Columns

By selecting 'Column' you can customise the view of your homepage by ticking/unticking the checkboxes.

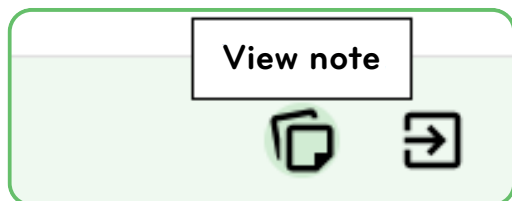
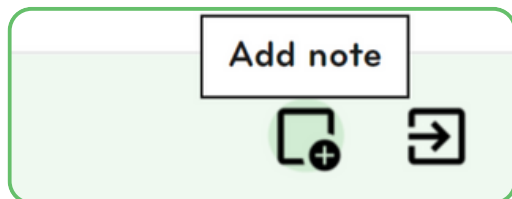
Your customised table will stay the same next time you log in.

Columns 7/7

- Company
- Code
- Pay group
- Status
- Next DC date
- Next PPE date
- Last DC date

## Adding notes

To add a note for a pay group or company, simply click the 'Add note' icon and then enter a note under 'Pay group notes' or 'Company notes'.



**i** Notes entered in 'Pay group notes' will only appear for that pay group. Notes entered in 'Company notes' will show in all pay groups for that company.

### Notes for Fortnightly Staff pay group

Company: The Cheeseshop Ltd

Pay group notes

Process pays Wednesday at 12pm

30/1000 Characters

Company notes

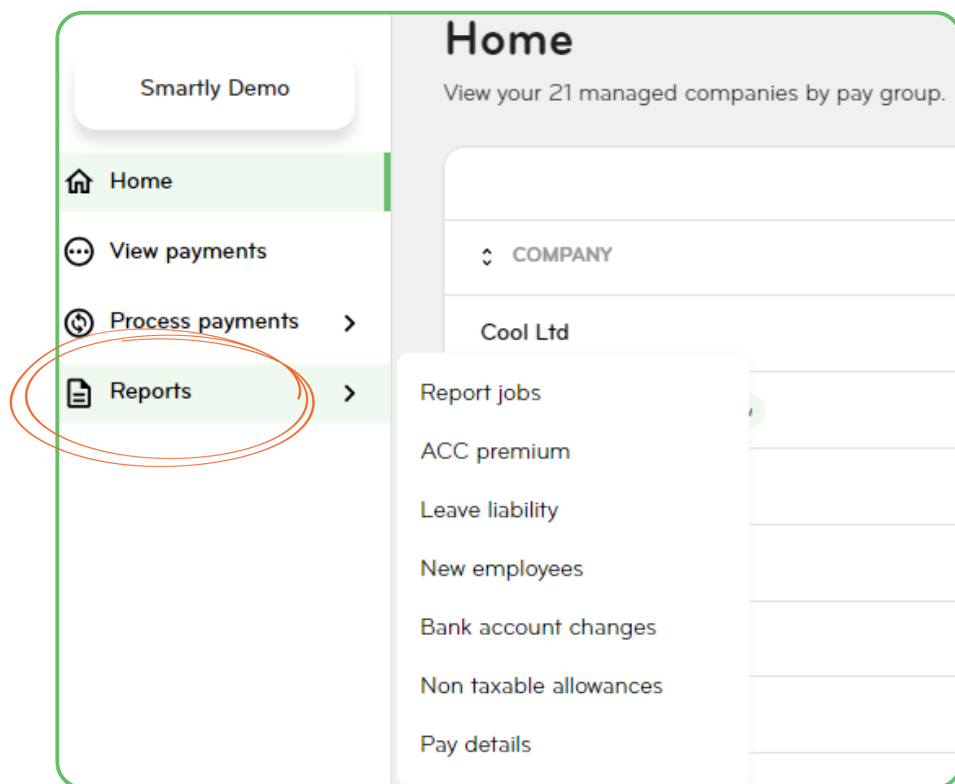
Company notes will be visible on all pay groups for this company.

0/1000 Characters

Cancel Save

# Generating reports

Your multi-site view has a range of reports and depending on the number of companies loaded in your site, some reports may take some time to generate. To generate a report, simply navigate to the 'Reports' tab on your side menu and select the report you need.



## Report jobs

This is the main reports window. You can generate the required report and then check back here to see if the report is ready to be downloaded.

## ACC Premium

This report contains ACC information for all the companies loaded in the multi-site view for the year you have entered. It arrives in CSV format.

*This report will appear in the main reports window and an email will be sent to the payroll email address to confirm when the report is available.*

## Leave Liability

A consolidated report of the liability for all companies.

*This report will appear in the main reports window and an email will be sent to the payroll email address to confirm when the report is available.*

## New Employees

A list of all employees entered in any of the companies between a specified date range.

*This report is instantly available.*

### Bank account changes

A list of all bank account alterations made on any of the companies between a specified date range. This report includes any new bank accounts. If a bank account has been changed, the report will show the old bank account and the new bank account details.

*This report is instantly available.*

### Non-Taxable Allowances

A list of all non-taxable allowances set up on any of the companies between a specified date range.

*This report is instantly available.*

### Pay details

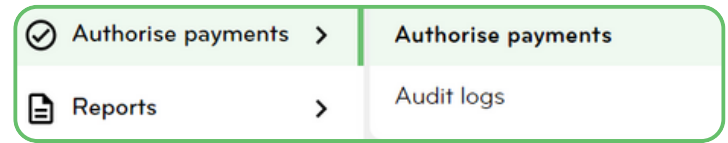
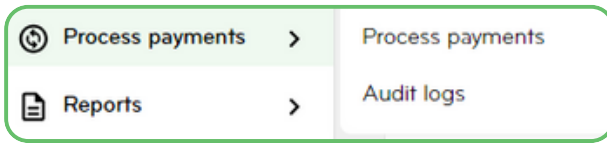
A CSV file with high level pay details which can be used to be imported into an accounting software, eg. Xero.

*This report will appear in the main reports window and an email will be sent to the payroll email address to confirm when the report is available.*



# Authorising pays

- 1 Depending on your multi-site view setup, select either 'Process payments' or 'Authorise payments'.



A list of companies will appear - these are the companies that have processed their pays and are awaiting for authorisation.

Please tick the pay runs you wish to process

Search:

Code ▲	Company Name ▾	Pay Group ▾	PPE Date ▲	Pay Type ▾	No. Pays ▾	Amount ▾	Process	Status
TEST	Travel Services School 37182	Fortnightly Staff	01/10/2023	Normal	2	\$3,367.93	<input type="checkbox"/>	

**X** Indicates the authorisation was NOT successful. Please check the audit logs for more details.

Direct Credit Date

Today's Date 13/02/2024

Password

- 2 Tick the 'Process' or 'Authorise' checkbox to select the companies to be authorised.
- 3 Enter your password.
- 4 Click 'Process' or 'Authorise'.

If there has been an error with the authorisation a red cross will appear at the right-hand side of all authorised pays. You may view the problem by selecting 'Process payments' or 'Authorise payments' and then 'Audit logs'.

## How to authorise individual pays

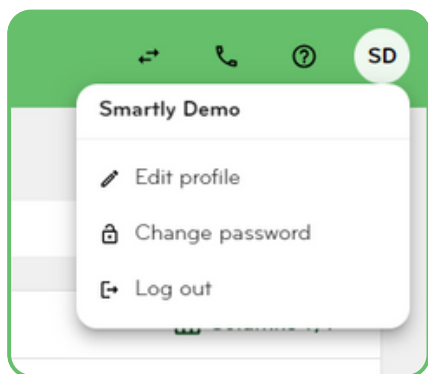
- 1 Click the 'Login' arrow next to the companies name



- 2 Click 'Run a pay'.
- 3 Follow the usual pay run steps to process and authorise the pay.

## Editing your profile

- 1 To edit your profile, you can click on your initials located at the top right corner of your screen, and then click 'Edit profile'.



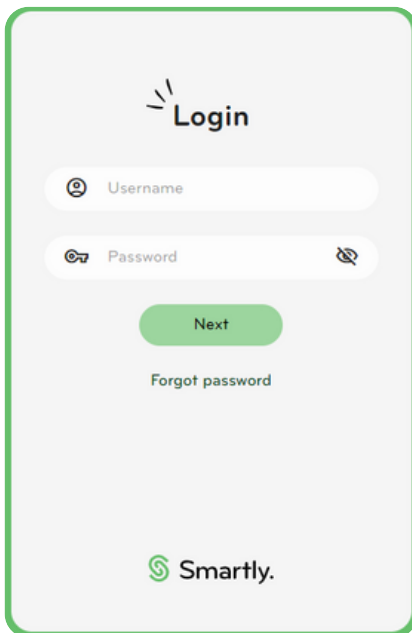
- 2 Make the required changes and click 'Save'.

A screenshot of the 'Edit profile' form. The form is titled 'Edit profile' and has a 'Save' button in the top right corner. It is divided into four sections: 'Personal details', 'Contact information', 'Employment information', and 'User details'.  
**Personal details:** First name (Smartly), Last name (Demo).  
**Contact information:** Email address (helpdesk@datacom.co.nz), Mobile number (0275273519).  
**Employment information:** Organisation (Smartly), Responsibility (Administrator), Position (Payroll).  
**User details:** Username (HCtest), Default MFA option (Email).  
A note under 'User details' states: 'Each time you log in, an access code will be sent to your default multi-factor authentication (MFA) option. Please ensure your details are up to date.'

# Resetting or changing your password

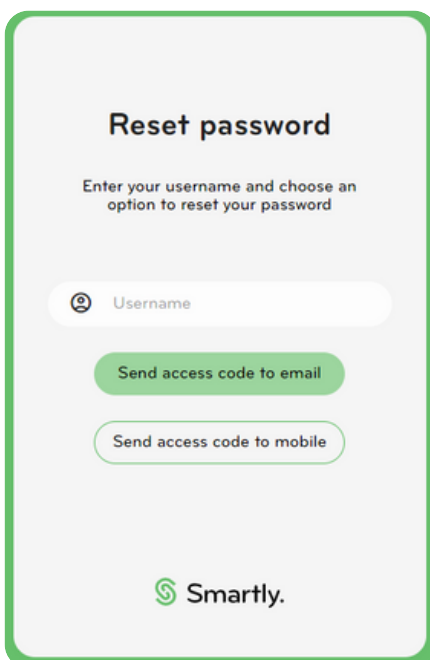
## Resetting your password

- 1 To reset your password, you can click on 'Forgot password' from the login page.



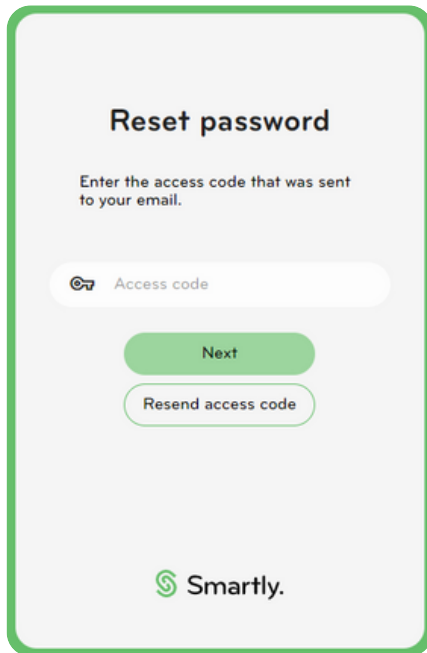
The image shows a mobile app login screen. At the top, there is a 'Login' title with a small icon of three lines radiating from a point. Below the title are two input fields: 'Username' with an email icon on the left, and 'Password' with a key icon on the left and an eye icon on the right. A green 'Next' button is positioned below the password field. Underneath the button is a link that says 'Forgot password'. At the bottom of the screen is the Smartly logo, which consists of a green circular icon with a white 'S' and the word 'Smartly.' to its right.

- 2 Enter your username and then send an access code to either your email or mobile.



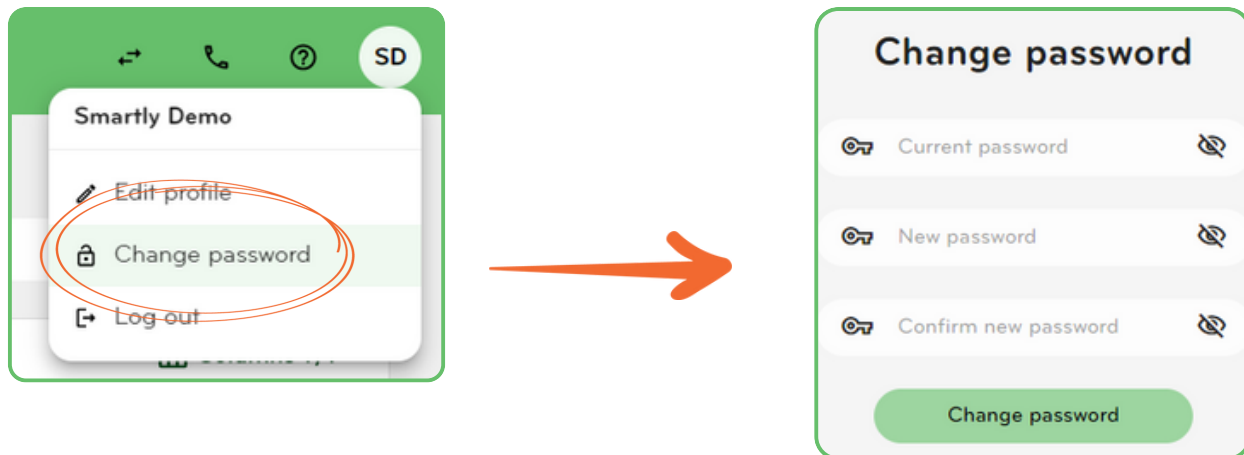
The image shows a mobile app 'Reset password' screen. At the top, the title 'Reset password' is displayed. Below the title is a subtitle: 'Enter your username and choose an option to reset your password'. There is a 'Username' input field with an email icon on the left. Below the input field are two buttons: a green button labeled 'Send access code to email' and a white button with a green border labeled 'Send access code to mobile'. At the bottom of the screen is the Smartly logo, which consists of a green circular icon with a white 'S' and the word 'Smartly.' to its right.

- 3 Enter the access code and follow the steps to reset your password.



### Changing your password

To change your password, you can click on your initials located at the top right corner of your screen, and then click 'Change password'.



# Appendix

## Status definitions

- **Upcoming**
  - weekly : IF today falls before [NextDCDate - 2d]
  - fortnightly : IF today falls before [NextDCDate - 4d]
  - monthly : IF today falls before [NextDCDate - 7d]
- **Urgent**
  - weekly : IF today falls on or between [NextDCDate - 2d] and [NextDCDate + 3d]
  - fortnightly : IF today falls on or between [NextDCDate - 4d] and [NextDCDate + 3d]
  - monthly : IF today falls on or between [NextDCDate - 7d] and [NextDCDate + 3d]
- **Missed**
  - All pay groups: IF today falls after [NextDCDate + 3d] and before [NextDCDate + 6d]
- **Inactive**
  - All pay groups: IF today falls after [NextDCDate + 5d]

# We're here to help

Whether you're after some information, or 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.

