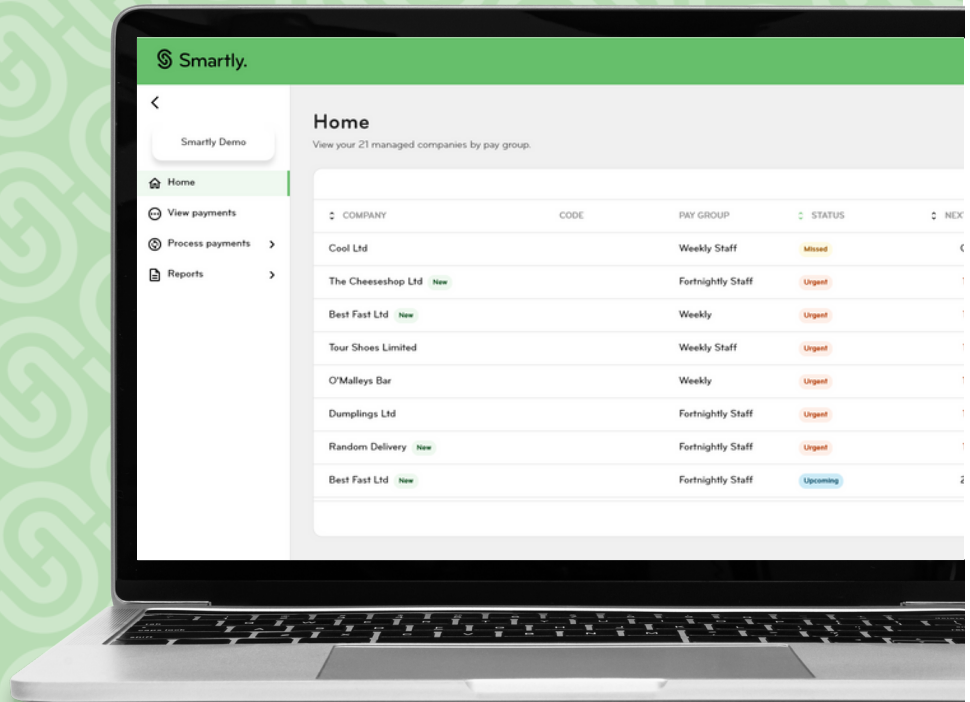# Smartly.

Guide to using your
multi-site view

Your quick overview to managing multiple companies
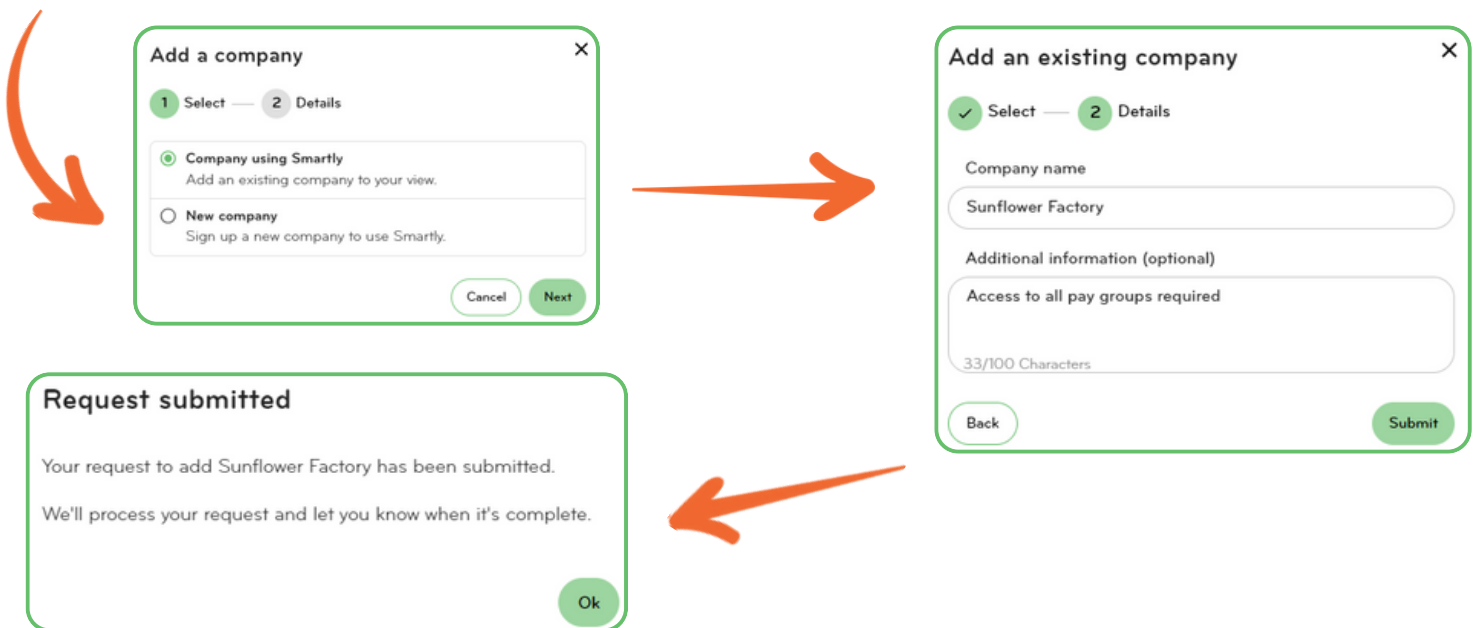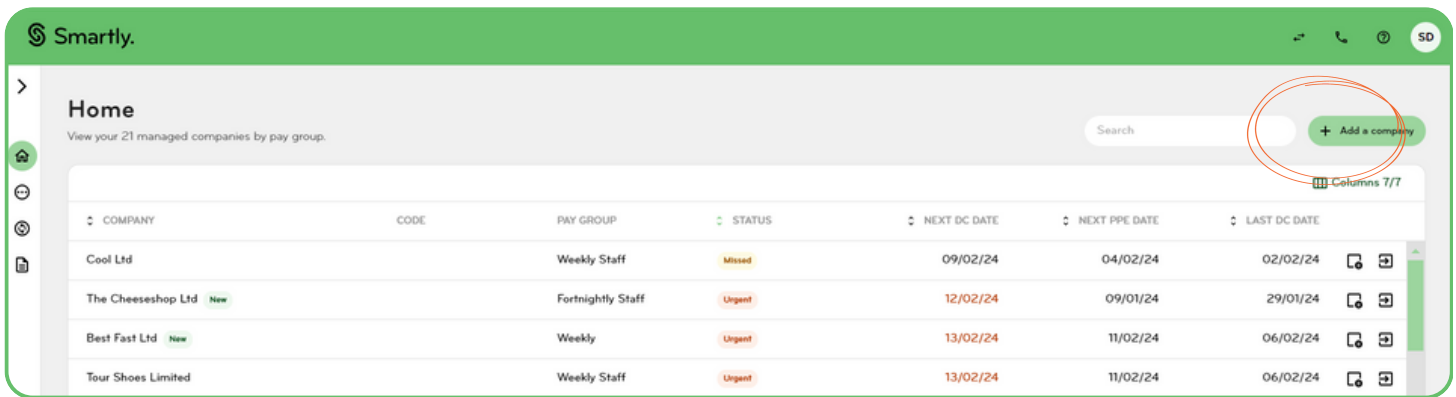
Smartly.

Contents page

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.
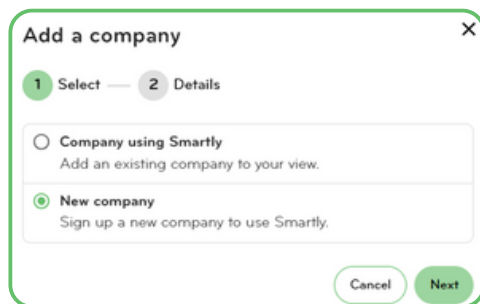A 'new' tag will be added next to the company name on the home page.

ℹ️ 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.
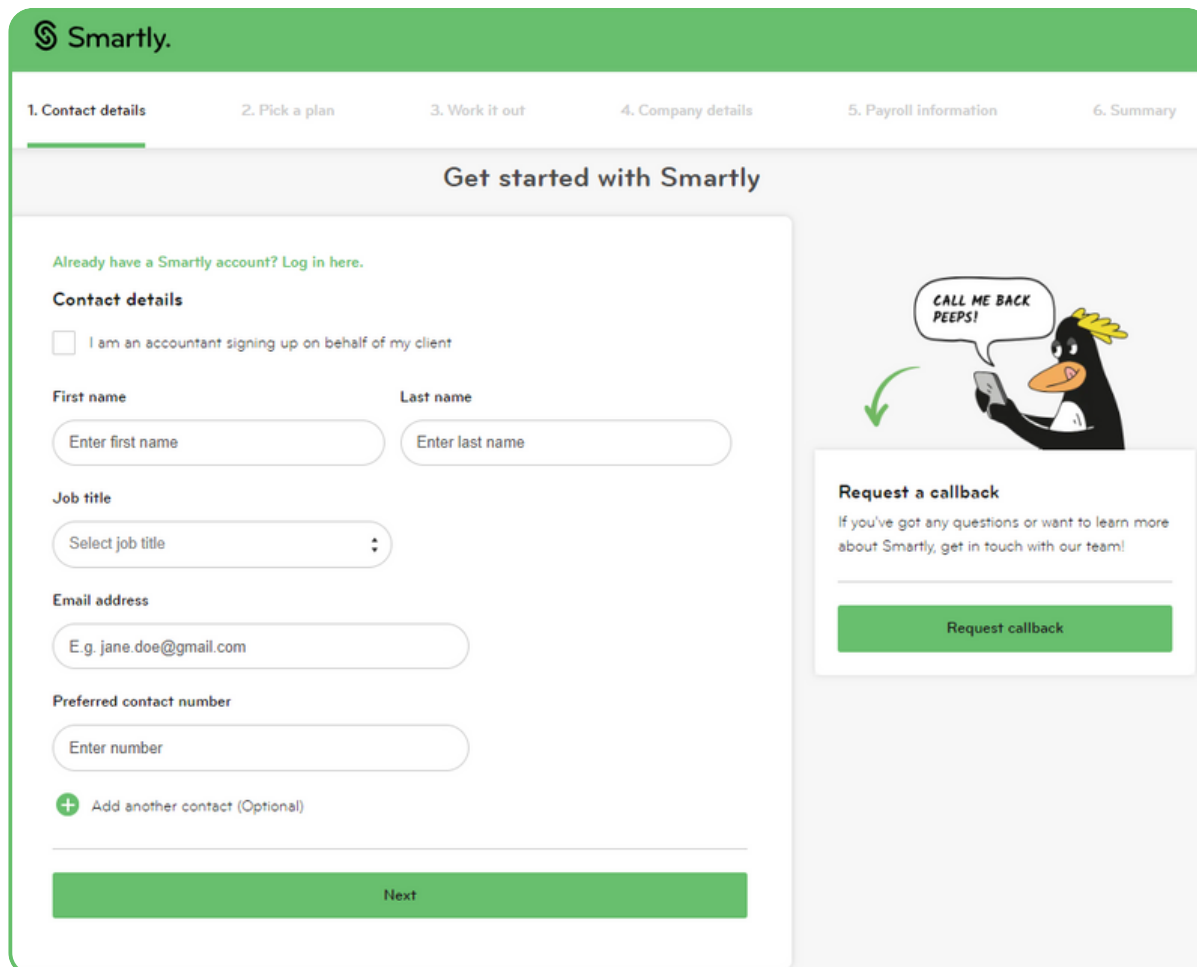
Using your multi-site view

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

Homepage navigation

(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.
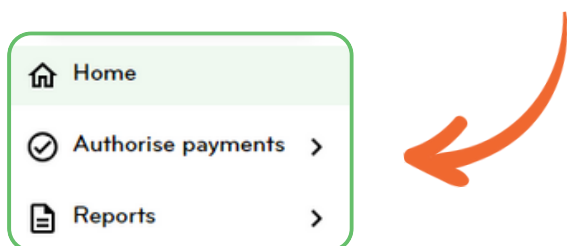
Multi-site view navigation

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'.

Add note

View note
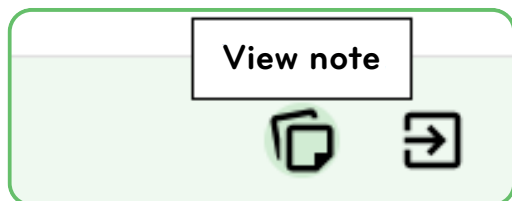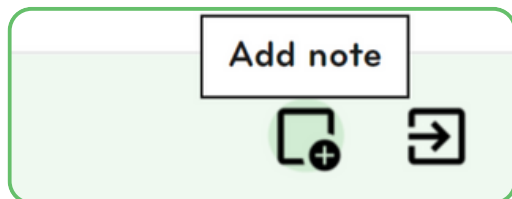
ℹ️ Notes entered in 'Pay group notes' will only appear for that pay group. Notes entered in 'Company notes' will show in all pay groups for that company.

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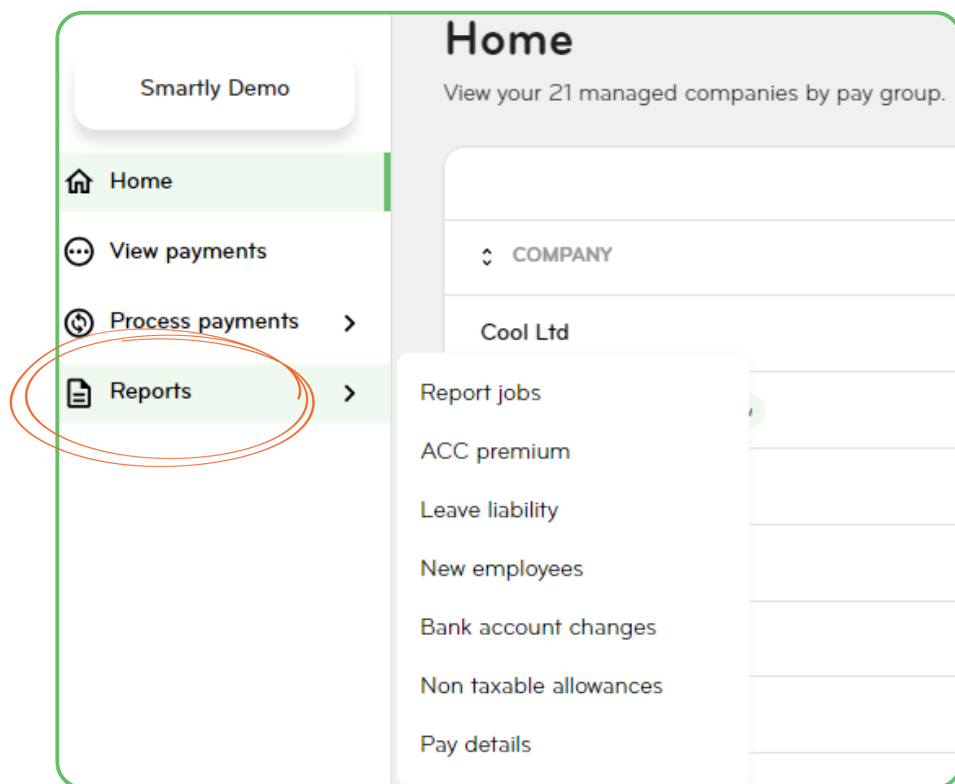
Report jobs
This is the main reports window. You can generate the required report and then check back here to see if the report is ready to be downloaded.

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.

How to generate reports

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.

How to generate reports

Authorising pays

1 Depending on your multi-site view setup, select either 'Process payments' or 'Authorise payments'.
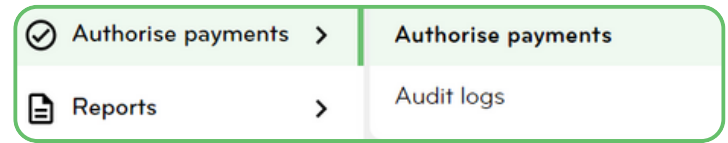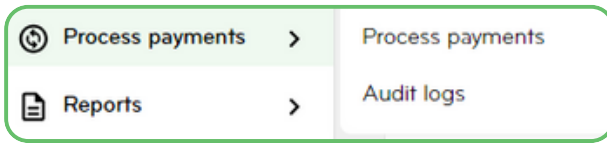
A list of companies will appear – these are the companies that have processed their pays and are awaiting for authorisation.

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 pays and send bank files
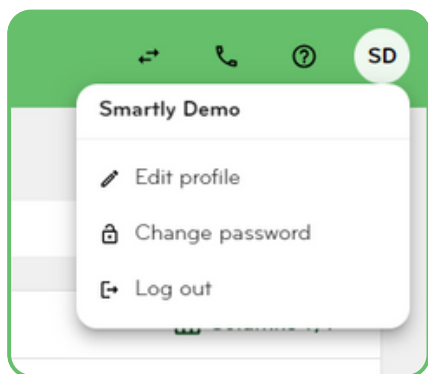
1 Click the 'Login' arrow next to the companies name

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'.
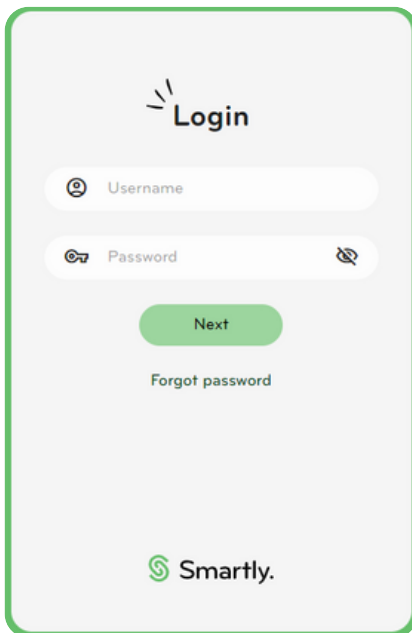

2 Make the required changes and click 'Save'.

How to authorise pays and send bank files

Resetting or changing your password
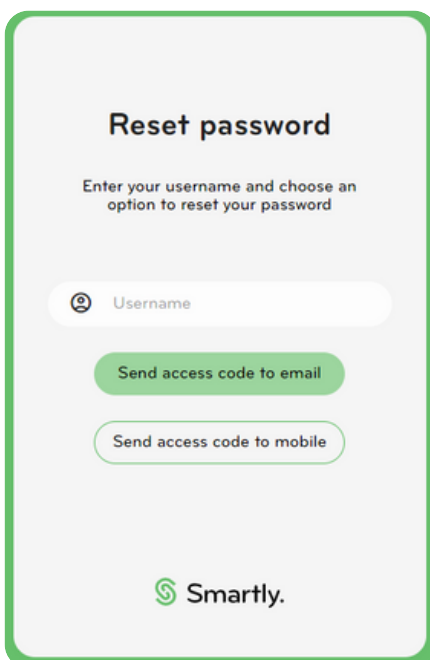
Resetting your password

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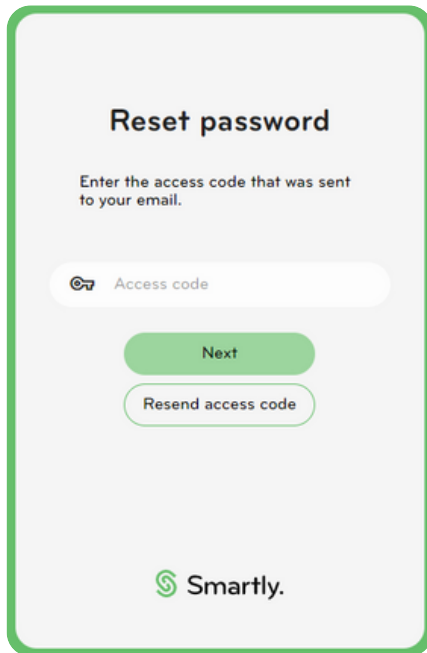

2 Enter your username and then send an access code to either your email or mobile.

Changing or resetting your password

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

Reset password

Enter the access code that was sent to your email.

Access code

Next

Resend access code

Ⓢ Smartly.

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'.

Smartly Demo

Edit profile

Change password

Log out

Change password

Current password

New password

Confirm new password

Change password
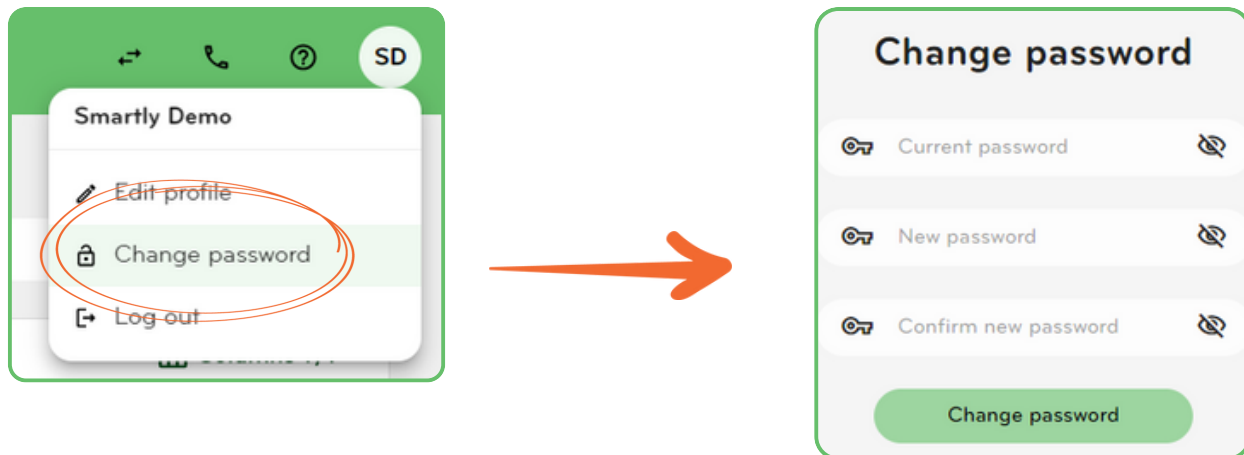
Appendix

- 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]

Changing or resetting your password

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.