

This Factsheet describes the facilities offered in **SmoothPay** to suit the requirements of Companies involved in providing security services generally and for *Red Badge Group* specifically.

**Note:** the Bulk Editing of Employees and the RedBadge tab in *Edit Employee...More* is only available to specific Sites. The export and import facilities described are available to all Users, in this and other formats as well.

## Creating Excel Timesheet Export File from SmoothPay – and emailing the File to a Recipient

Create an Excel Timesheet Export File using the *Wizards...Make Timesheet File* and the options indicated above.

The output destination (*Location*) is not so important, but ensure the *Recipient's Email address* and the “Red Badge” option is selected.



Choose *Make file*:



You will be prompted for a Department (or choose all Departments for a comprehensive File), then choose *OK*.

The magic happens and an *Excel Output File* is generated. This goes through to a new *Report* named *XLSRB*, then via the new XLS Exporter to create a *File* called *XLSRNB.XLS* which is what will actually be emailed to the Recipient. It copies over the specified Export File Name when the process is completed – it's just how it is and is not that important.

If you choose not to email the *File* you can easily send the *TIME.XLS File* from the *Output Folder* afterwards if you wish. Remember though it gets overwritten each time you run the utility. This makes it convenient for checking before sending etc.

## Email Setup

If you have not configured **SmoothPay's Email System** to use SMTP then you'll be prompted whenever an attempt is made to place an email in your Outbox (the Excel File email).

We suggest setting your system up as follows. If it doesn't work out, call or revert to the current method. You may need IT assistance, but it's pretty straight forward.

Set as follows in *Company Setup...Email Setup...Configure*, with the appropriate changes to Email addresses and SMTP Server Name:

Email messaging configuration

Methods used for sending emails

Backup, restore and feedback data SMTP (recommended)

Error messages and logs SMTP (recommended)

Reports and other documents SMTP (recommended)

Sender's email address andy@redbadge.co.nz

SMTP settings (required only if SMTP options selected above)

BCC all SMTP emails to michele@redbadge.co.nz

SMTP server name smtp.xtra.co.nz

Requires logon to pop server before sending (rarely required)

POP server name pop3.xtra.co.nz

Logon user name username

Logon password cccccccc

Save

Test smtp

Test client

## Bulk Editing Employee Records

This utility is provided to enable the quick setup of existing Employees or to accommodate bulk changes.

Choose *Wizards...ToolBox...Bulk Employee Edit Grid*.

**SmoothPay** will make you do a *Backup* because the Tool permits mass changes to Employee data, and if there are any errors, you can then *Restore* easily and try again:

Employee bulk edit (use with CAUTION! - updating five records)

ID	Name	First name	Rating	Gender	Role	Training	Warden	Home phone	Phone 2	Cell phone	Suburb
3105	AA AUUCK CASUA	Sample	1	M	S	1	<input type="checkbox"/>				
3106	AAC ChCh CASU	Sample	1	M	S	1	<input type="checkbox"/>				
3177	AAH Ham CASUA	Sample	1	M	S	1	<input type="checkbox"/>				
4592	ABBOTT	Katrina	1	F	S	1	<input type="checkbox"/>				
5175	ABBOTT	Melissa	1	F	S	1	<input type="checkbox"/>				
5306	ABDI	Amina	1	F	S	1	<input type="checkbox"/>				
5305	ABDI	Anisa	1	F	S	1	<input type="checkbox"/>				
5372	ADAMS	Donna	1	F	S	1	<input type="checkbox"/>				
5416	Addis	Stephen James	1	M	S	1	<input type="checkbox"/>				
5818	ADEN	FARAH	1	M	S	1	<input type="checkbox"/>				
5516	ADRIAN	Barry	1	M	S	1	<input type="checkbox"/>				
4995	AH DAR	Jones	1	M	S	1	<input type="checkbox"/>				
4755	AHMED	Zubair	1	M	S	1	<input type="checkbox"/>				
5143	AIAYAO	Fatu Isaac	1	M	S	1	<input type="checkbox"/>				
4811	AINSLEY	JOHNATHAN	1	M	S	1	<input type="checkbox"/>				
5525	Aitken	Emma	1	F	S	1	<input type="checkbox"/>				
5058	AIVI	Ulises	1	M	S	1	<input type="checkbox"/>				
5577	AL KAFAJE	Raed	1	M	S	1	<input type="checkbox"/>				
1032	Al-Safwani	Amar	1	M	S	1	<input type="checkbox"/>				
4800	ALAE LUA	Jennifer Hikuleou	1	F	S	1	<input type="checkbox"/>				
5904	Albert	Jace	1	M	S	1	<input type="checkbox"/>				
4338	ALI	Abraham	1	M	S	1	<input type="checkbox"/>				
3642	ALI	Sajjad	1	M	S	1	<input type="checkbox"/>				
5115	ALLAN	Belinda	1	F	S	1	<input type="checkbox"/>				
5157	ALLEN	Anthony	1	M	S	1	<input type="checkbox"/>				
4527	ALLEN	Peter	1	M	S	1	<input type="checkbox"/>				

Just make your changes. The Yellow Fields can't be edited and they stay visible - even when you're editing way over on the right hand side, as with *frozen cells* in Excel.

When done, click the Close "X" in the top right hand corner or use Ctrl+F4 to close the form. Changes are effective the moment you make them – so take care.

## The RedBadge Tab

This is provided in *Edit Employee...More...RedBadge* and provides access to individual Employee settings specific to Security Organisations:

More details for Andrew 1

Contract   Apprenticeship   Miscellaneous   **RedBadge**   OK

Rating: 1

Role: S

Training level: 1

Phone2:

Phone3:

Suburb:

COA'S-SG#:

Comments:

Fire Warden

A mass update grid is available from Wizards..ToolBox

## Importing Timesheets

Now we get to the important bit – importing time data from a returned spreadsheet. As long as it hasn't been hashed around too much, you should be able to import it in the usual manner via *Wizards...Excel File Import...Timesheets*.

The following settings are typical for the new format Timesheet:

Excel Data Import

File name: C:\TEMP\TIME.XLS

Import  
Cancel

Enter the spreadsheet column letter for each of the following items (if possible). Leave blank if not stored in the spreadsheet.

Data type	Column	Data type	Column
Employee ID	A	Account code	
Ordinary time	S	Job code	
Surname	B		
First name	C		
Pay rate	R		

Alternative costing options (used only if no columns are specified above)

Use these fixed cost centres ---> Account: 5-1600  
 Use employee default cost centres Job: SESBF

This routine will import Timesheet Data from a version 4.0 Excel Spreadsheet into the payroll. An audit trail of import entries and their success (or failure) will be produced.  
NOTE: Timeclock importing is an additive process - it will not replace any data already imported. Including the employee's External ID (badge number) or internal employee number is the best method for matching up the data, although just the surname can be used (which requires manual confirmation or selection from the employee list for EVERY record).  
A suitable Excel file template can be produced from Wizards .Make Timesheet File

Click *Import*.

As long as everything is good in the *File*, a full import of timesheet data for over 400 staff takes **under one minute**.

Feel free to contact our **HelpDesk** if you have any questions.

**\* END \***