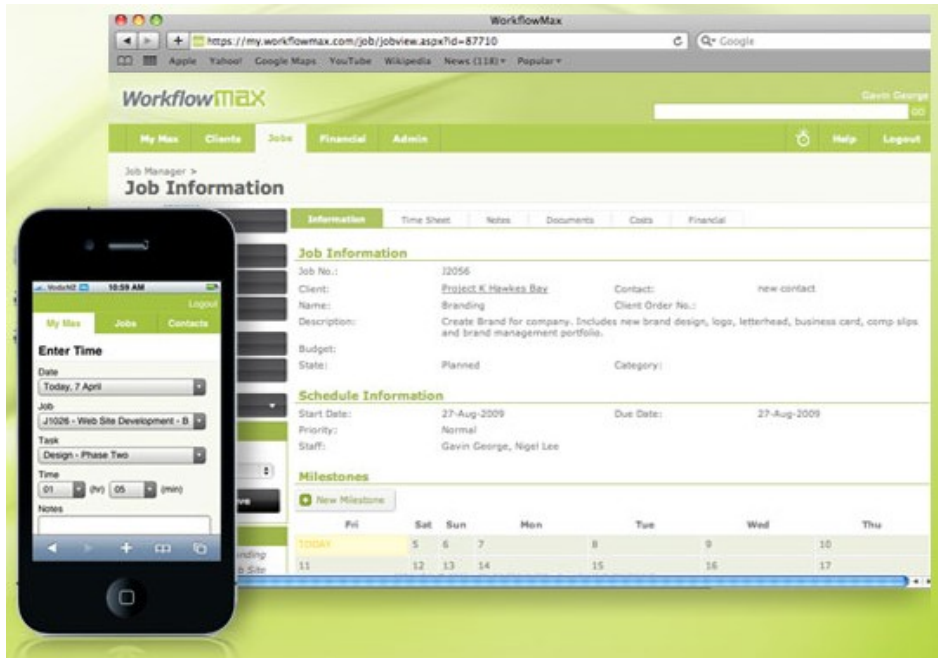


**SmoothPay** provides built-in communications and *timesheet import* from the excellent *WorkflowMax* (Online Job, Time and Invoice Management solution).

*WorkflowMax* also connects to leading accounting solutions (including MoneyWorks, Xero etc) allowing you to effortlessly transfer your Sales, Purchases, Client and Supplier data.



*No more manual keying-in timesheet data - SmoothPay talks directly to WorkflowMax and imports the time entries, jobs and activities (tasks) in a matter of seconds.*

*Staff can even enter time and job activity direct from their iPhone!*

Visit [www.workflowmax.com](http://www.workflowmax.com) for more details and pricing.

This step-by-step guide shows you how to use **SmoothPay's** built-in *WorkflowMaxTime* Import Utility. It does not cover setting up or using *WorkflowMax* - please refer to the *WorkflowMax How To Guide and Tutorials* available on their website.

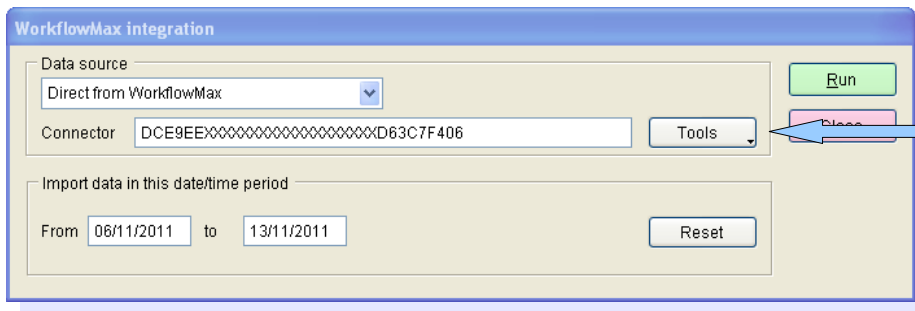
## Communicating with WorkflowMax

**SmoothPay** "talks" to *WorkflowMax* over your Internet connection, so your *firewall* and *internet security software* **must** allow **SmoothPay** to access the Internet (access is also required so **SmoothPay** can check for Updates, send Payslips, use the free **SmoothPay** FTP Backup, etc.)

To communicate, **SmoothPay** also needs a *Connector Key* (an Account Code that **SmoothPay** can use to access your *WorkflowMax* data).

### To obtain a Connector Key:

- Login to *WorkflowMax*, choose *Admin...Interfaces...Connectors* (make sure you click "Connectors" to see the full list)
- **TIP: you can go directly to WorkflowMax from SmoothPay – choose Wizards...WorkflowMax then select the Website option from the Tools menu**
- On the **SmoothPay** option, choose *Generate Key*, or if you have already generated a key, as in the example shown, choose *Enable* if necessary.
- Copy the generated *Connector Key* - double-click the *connector key text*, then *Edit...Copy* or CTRL+C
- Start **SmoothPay**, choose *Wizards...WorkflowMax*, then *Paste* (CTRL+V or *Edit...Paste*) the *Connector Key* into the *Connector Field*



Use **Tools** to check your connection is working correctly, to print a list of staff, or to upload staff to WorkflowMax

## Employee Numbers

Each Employee is automatically assigned a *Staff ID number* when they are added to *WorkflowMax*. A list of all Employees added to *WorkflowMax*, along with the ID's allocated, can be produced from the "Tools" button menu.

So that **SmoothPay** knows who each *WorkflowMax* Employee ID represents, the Employee # used by *WorkflowMax* must be entered as the Employee's Badge #:

ACC Code	53210	Petroleum fuel retailing (includir
Badge #	28872	GST? None
Date started	08/03/2006	<input type="checkbox"/> Terminated? / /
Notes		

For new Employees not yet added to *WorkflowMax* (no Badge Number yet), simply use the *Tools...Add new Employees to WorkflowMax* option.

The *Time Entries* imported from *WorkflowMax* will now match an Employee and **SmoothPay** will be able to process the *time entries* correctly.

## Importing Timesheet Entries from Workflow Max

Choose *Wizards...WorkflowMax*

### Data Source

Select the Data Source - **SmoothPay** currently supports just the preferred direct method at present, though this may be extended to provide support for exported file formats if Internet access is not available from Payroll.

**Connector:** This must be set to the *Connector Key* generated for your Account (refer to the *Communicating with WorkflowMax* section above). You can use the *Test option* to make sure your communications work OK.

### Import Data in this Date/Time Period

The *date and time range* are set automatically to suit your usual Pay cycle, however you can change these to suit any other range if you need to.

**Reset:** This option resets the date/time range to the default values established when the utility started - your default pay cycle and the dates that would cover.

Choose **Run** to *import* and process time entries.

An *Audit Report* will be produced showing entries processed. Error/ignored entries are reported too with an appropriate message.

## Please Note

Time entries imported are ADDITIVE! This means that repeated imports of the same data will probably duplicate entries already imported.

If you wish to re-import all Time Entries for a particular period, simply clear all Employees from the *Wizards...Quick Pays* screen, then re-import your (corrected) data.

Use *Pay Input* to correct entries as needed.

## Feedback

We're always keen to do better!

Any and all feedback is appreciated and if you feel we could include better examples, provide more explanation, provide references to additional information, make a process easier to use, or you spot something that isn't working the way it's supposed to - please let us know.

**\* END \***