



# WorkflowMax

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 (incl. *MoneyWorks*) 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 WorkflowMax time 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.

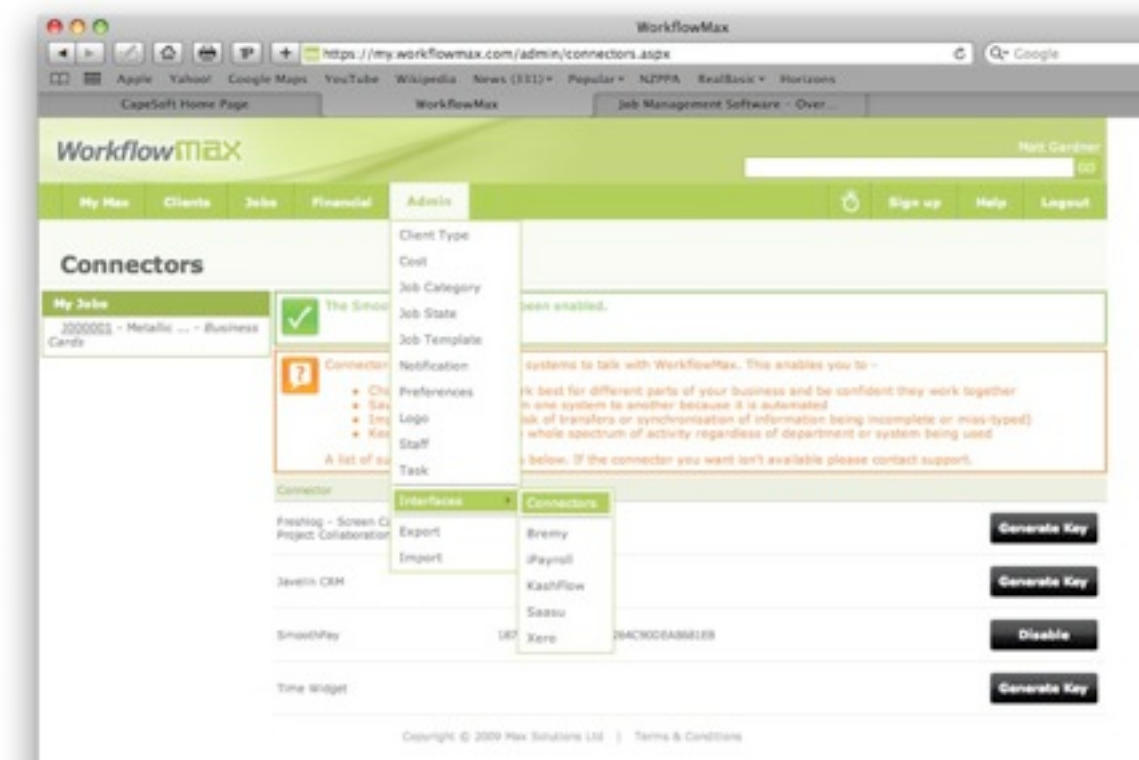
## Communicating with WorkflowMax

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.*)

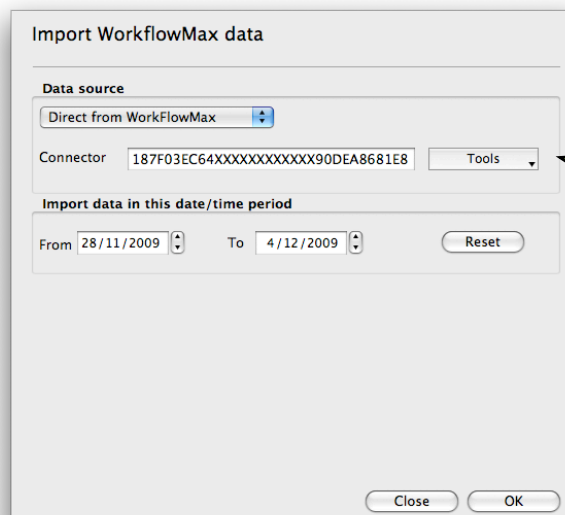
To communicate, SmoothPay also needs a “**connector**” key (an account code that SmoothPay can use to access your WorkflowMax data).

## To obtain a connector key

- login to WorkflowMax, choose *Admin..Interfaces..Connectors*



- 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 or ⌘+C)
- Start *SmoothPay/Gold*, choose *File..Import..TimeClock..WorkflowMax*, then Paste the connector key into the Connector field (CTRL+V or ⌘+V or *Edit..Paste*)

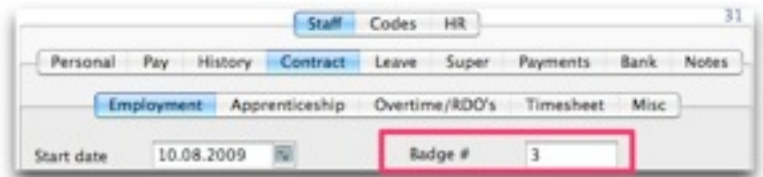


Use *Tools* to check your connection is working correctly, to print a list of staff, or to upload staff to WorkflowMax

## Employee numbers

Each employee is automatically assigned a staff ID number when they are added to WorkflowMax. A list of all staff 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 #**:

A screenshot of the WorkflowMax software interface. The 'Staff' tab is selected, showing a menu with options: Personal, Pay, History, Contract, Leave, Super, Payments, Bank, Notes. Below this, there are sub-tabs: Employment, Apprenticeship, Overtime/RDO's, Timesheet, Misc. The 'Start date' is set to 10.08.2009. The 'Badge #' field is highlighted with a red box and contains the number 3.

For new employees not yet added to WorkflowMax (no badge number yet), simply use the *Tools..Upload staff* 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 WorkflowMax

Choose *File..Import..TimeClock..WorkflowMax*

### Data Source

Select the data source - SmoothPay currently supports the 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 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 **OK** 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.



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 *Who to pay* screen, then re-import your (corrected) data.

Use the *Staff..Pay* pages to correct entries as needed.

## Feedback

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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.