Planday partner demo

- Get started

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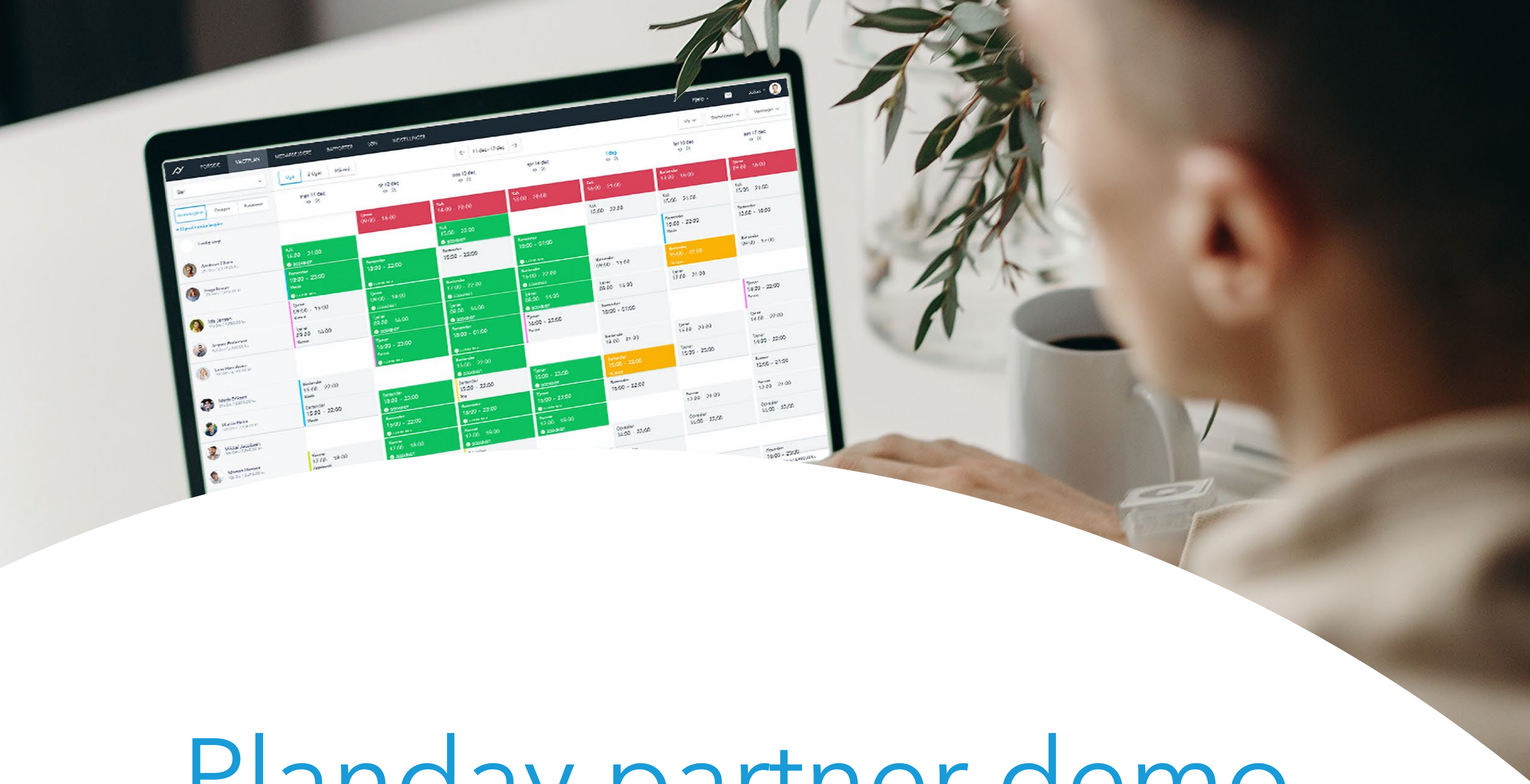


Planday partner demo - Get started

Welcome to your new Planday partner demo. This demo is meant for you to try out the product in a safe environment where a live scenario has already been set up so you can jump straight into it.

We've designed a scenario that will take you through a common day-to-day experience using Planday. In this scenario, you're an owner of a retail shop called the Planday Store. Here's an overview of your business:

- You employ six people, a mix of full-time, part-time and casual staff at one location (known as a department in Planday).
- The six employees are divided between Customer Service and Stock Assistant which are referred to as employee groups in Planday.
- You'll have a few weeks of pre-populated rosters that suit your typical business requirements.
- A couple of staff tasks for you to action including a clock in entry for an employee shift (referred to as Punch Clock in Planday) and an annual leave request.

On the following pages are a set of tasks for you to follow chronologically to get an understanding for how Planday operates and how it will benefit your clients as part of their daily operations.

We don't recommend activating any integration (including Xero Payroll, Square or Vend) in this environment to avoid mixing dummy data with real data.

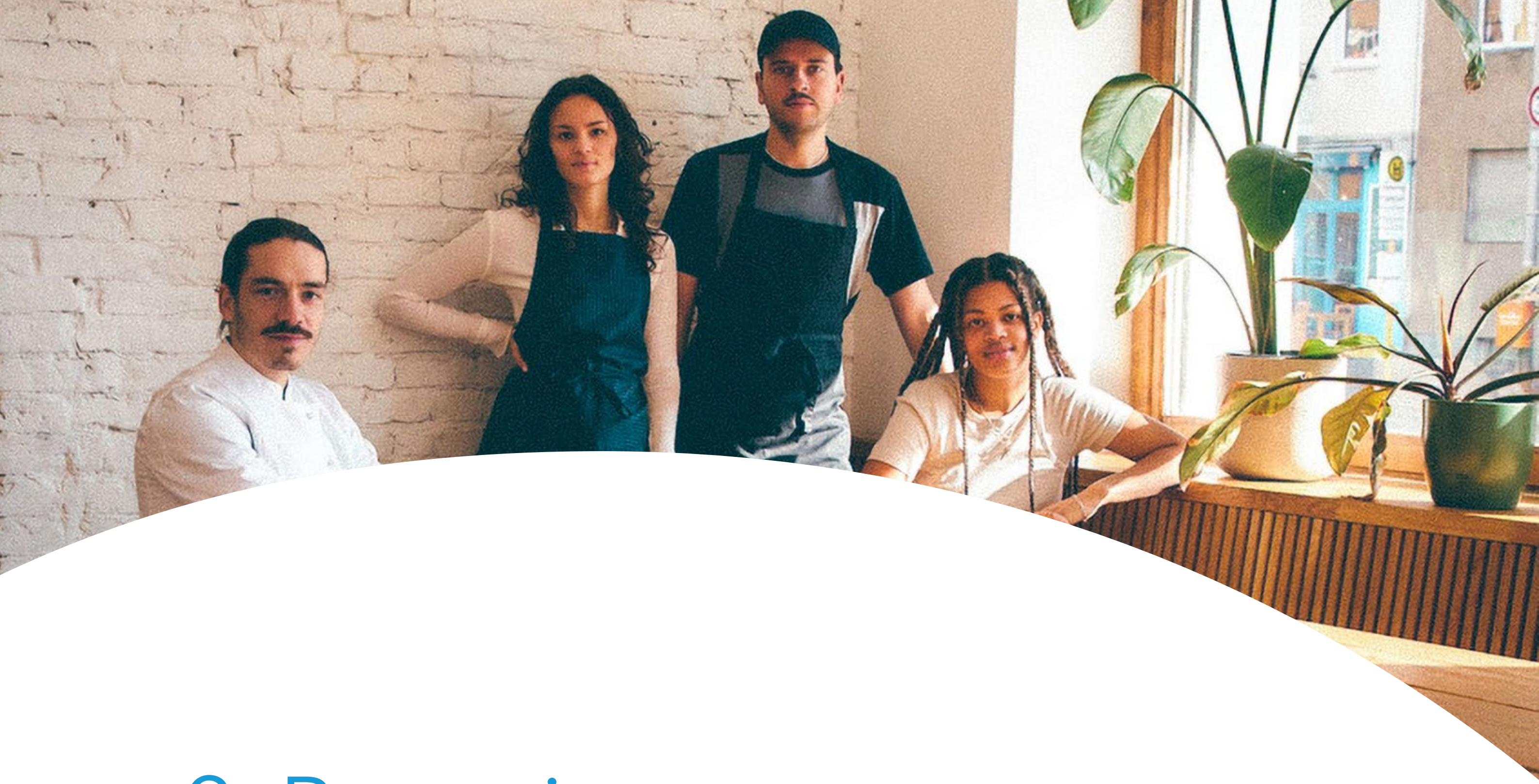
Expected time to complete: 40 – 55 minutes

1. Initial set up

☐ Set your password, log in & personalise your dashboard (3 – 5 minutes)

You'll have received an invitation to your inbox. Follow the link to confirm your e-mail address and set your password.

- Once you've successfully logged in you can personalise your dashboard.
- Click 'Edit dashboard' in the top right corner and tick on the following:
    - Pending actions
    - News
    - Events
    - Salary percentage
    - Revenue

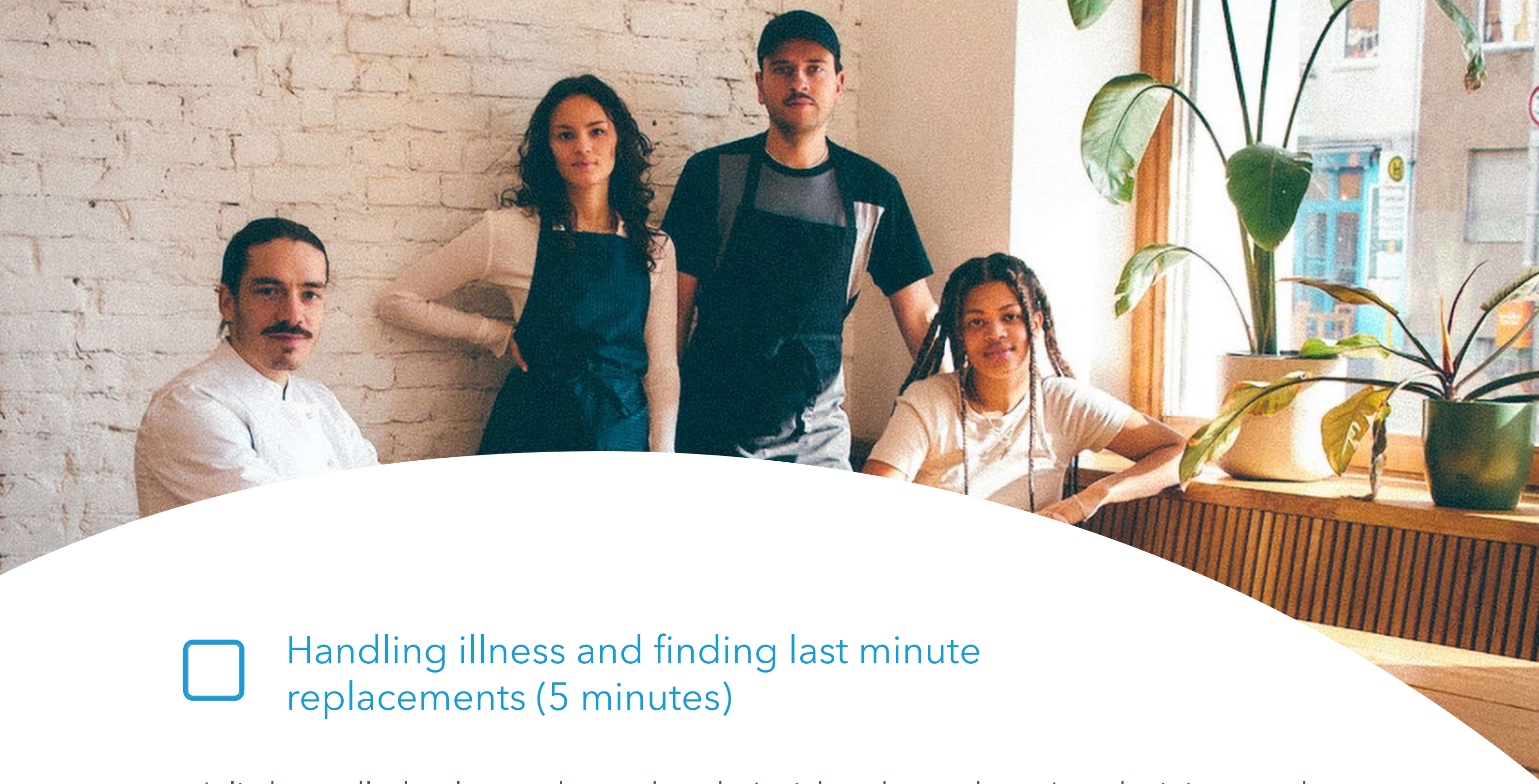


2. Rostering

☐ Save your schedule as a template and roll it out for the next 4 weeks (7 minutes)

You already have a few weeks of rosters (known as Schedule in Planday), but to make life easier for yourself you want to save it as a template and roll it out for the near future, so all your employees get instant access to their upcoming shifts.

- Navigate to the schedule via the black bar at the top of the screen and make sure you're on a week with existing shifts
- Go to Templates in the top right corner and hit Save as template --> Give it a name and save
- Go to the first empty week --> Click on Templates again and hit Apply template. Choose the one you just saved and then choose to apply it four times and hit next --> Apply
- Use the arrows at the top of the schedule and scroll ahead to confirm that four weeks have now been rostered.
- On the 4th week, you want to roster Mary for an extra shift. On your keyboard, you can hold down ALT (Windows) or OPTION (Mac) and then click and hold her Tuesday shift to drag a copy of it onto Wednesday.
    - Alternatively, you find an empty day on Mary's line and click the blue '+' icon to manually create a new shift



☐ Handling illness and finding last minute replacements (5 minutes)

Julia has called to let you know that she's sick today and won't make it into work. You'll need to find a replacement and update the schedule.

- Copy Julia's shift and drag it to another employee who isn't already working.
- Click on the grey area of the new shift to open up the edit window (avoid the employee group name and the time slots for now).
- Select "Notify employee – Message" - which will send a notification to the employee that they've been given a new shift.
- Go back to Julia's original shift and click on the grey area --> Change the shift type from 'Normal' to 'Sick no pay'
    - This will ensure that you can later pull a shift type report and that the employee will not get paid for this shift.

☐ Using costs and revenue in the schedule (5 minutes)

To optimise your business operations, you can use the live schedule cost calculations in the roster and compare it to your projected revenue. This can give you an instant overview of whether you are on track with appropriate staff levels. And in time, it will allow you to compare the same week or month from previous years with the current year.

- In the top right corner of the schedule, click on the three little dots and hit View settings --> then select 'Revenue' and 'Payroll hours and cost'.
- Make sure you are on the first week with shifts in the schedule, and you should now be able to see both payroll costs and revenue at the bottom of the screen.
- A threshold of 15% has been preconfigured on your portal, meaning that you want to spend 15% or less of your revenue on your schedule costs.
- Try moving a shift from one day to another to see how the numbers update to give you a live look at these figures.

☐ Register timesheets using Punch clock (5 minutes)

To accurately track your employee's time and attendance you can make use of the Punch clock feature in Planday. Employees can clock in and out of their shifts, which will then come to you as the manager for approval.

(Optional) By default, employees can clock in no matter where they are. However, you can set up a geolocation area or put in your Wi-Fi IP address to determine where employees can clock in.

- Create a shift for yourself in the Schedule for today's date from 9am-5pm.
- Download the Planday App and log in with the same credentials as you used on the computer.
- Under Punch Clock on the front page, hit "Start shift". --> Leave a comment saying "Sorry I was late". --> Hit "Start shift".
- Browse through the App to experience it from the Manager's perspective for **2 minutes.** --> After 2 minutes, you can go back to the front page and hit "End Shift". --> Hit "End shift" again. (If it's less than 2 minutes, then it won't be registered).

3. Employee management

☐ Set up your employee with an Award (7 – 9 minutes)

We've set up all your employees with an Award except one. By setting up your employee with an Award, Planday helps you keep track of ordinary vs. overtime hours, penalties and working time rules to help you see if you've over or under scheduled your employees.

- First, click on People in the black bar at the top of the screen.
- Navigate your way down to the employee Hannah and click on her line --> Click 'Edit' at the bottom of the pop-up window to the right.
- At the top of the screen, navigate to the Employment tab. From here, you'll set up three components:
    - Employee type: Click the 'Edit' button and from the dropdown menu, select "General Retail award (MA000004) - Full time" --> hit 'Save'.
    - Employee group: Click on the already assigned employee group "Customer service" --> Choose any Classification you like --> Set a valid from date that's at least two weeks in the past --> Hit 'Save'.
    - Contract rule: Click the 'Add' button --> Choose the "General Retail (MA000004) - FT" option and set a valid from date 2 weeks prior on the Monday to align with your current pay run period, which goes from Monday to Sunday on a weekly basis.
        - The 'Total hours per week' - 'Time interval for regular hours' and 'Maximum hours per day', will determine when automatic overtime penalties will apply to your employee.
        - Leave these options with the preconfigured data and hit 'Save'.
- You can then navigate to the schedule to see that there's now a coloured circle around Hannah's name in the schedule, which you can click to see whether you'll be paying Hannah any overtime for the rostered period. The colours indicate whether she's scheduled for her contracted hours (green), under scheduled (yellow) or over scheduled (red) where penalty rates are applied. Play around with Hannah's schedule to see how it works.

4. Approving timesheets and leave for payroll

☐ Approve any outstanding Punch Clock entries (3 minutes)

Your employees can register their worked hours by clocking in and out on their phones, making it easy for you to update the timesheets by simply approving the Punch Clock entries.

- Navigate to the Dashboard by hitting the Planday logo in the top left corner --> Scroll down to the Pending actions section and click on 'Punch Clock entries'.
- Here you'll see the Punch Clock entry you made on the App just before. If required, you can edit the start or end time of the shift, otherwise simply tick the box on the right-hand side and hit 'Approve selected' in the top left corner.

☐ Approve any outstanding leave requests (2 – 3 minutes)

One of your employees has submitted a leave request, and you want to approve this request so it can be sent to Xero alongside the timesheets to update their remaining leave balance in Xero.

- Navigate back to the Dashboard and the Pending actions section again --> This time click on 'Leave requests'.
- Click on the request to get an overview of the impact of the leave request --> Click on 'Approve'.
    - Once approved, it will be included in the Xero Payroll for this pay run.

☐ Approve the remaining timesheets (2 – 3 minutes)

Now that you've approved the outstanding Punch Clock entries and leave requests, you want to finalise the approval process before syncing the timesheets to Xero Payroll.

Navigate to the schedule and make sure you're on the week that includes the Punch Clock entry and leave request you just approved. There should be one green shift and one shift marked as Annual leave.

- To approve the remaining shifts, hover the mouse over one of the grey shifts and tick on the little white box --> Now go to the bottom left corner of the screen and hit the blue square icon --> Click the tick icon to approve all remaining hours.

5. Payroll

☐ Export your payroll from Planday (4 minutes)

You've now finalised your week and it's ready for payroll. As this is a demo portal and therefore isn't connected to a Xero organisation, you won't be able to sync the hours to Xero. Instead, we've put together a short video taking you through the Planday/Xero Payroll integration step-by-step.

Running Xero Payroll using Planday - watch this video.

Congratulations, you've now completed all the steps of this training course and have mastered the basics of operating your business using Planday. You can now explore the many other features that Planday offers on your own using our **Help Centre** or reaching out to a Planday Customer Enablement Consultant via the chat icon in your portal for any support you might need.