Guide for Smith & Reed Timesheet Portal

Logging in and getting started



You will have already received your **Userid** and **Password** via email. (*Please do not copy and paste your password into the login page, as it will not be accepted*).

smith	
Sign In	Forgot username? Forgot password?
email or username	
password	
Remember me?	Login

Great you are all set up!

Once you have logged in you will see a screen similar to below:

				Please ensure you hav	Test e set your availability as soo	n as possible for the next week			
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	lete Timesheets	Un-Authoris			Auth	orised/Ready		Processed Timesheets	
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Authorising Timesheets

You will see there are various elements in coloured sections for timesheets:

Incomplete Timesheets
These are timesheets that the worker has not ye
entered hours into.

Un-authorised Timesheets

These are the timesheets that you need to check and authorise.

Authorised/Ready

These are timesheets that have already been authorised ready to be paid/billed.

Processed Timesheets

These are the timesheets have that have been actioned and the worker paid, and the invoices raised. To **authorise a timesheet** click on the Un-authorised button:



This will then open a screen similar to the below

																				Total Selecter
Drag a co	slumn head	er and drop it here to group by that column																		
		Employee	Ŧ	Job T	SI	tart 🔻	En	nd 🔻	Но	ours	r Co	ist	Expenses	T	TS Code	Ŧ	Ord No.	T	Report To	
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	,	Year / Period: 2021/2 Query Date: New Query Query By: Query:																		Change Order No
	Rates	Expenses Documents Save changes O Cancel changes Click	cell to	edit - click in cell again to bring up	o quic	ck entry														
	Payr	ment Type	Des	cription	2	Mon	Tue	e We	ed	Thu		Fri	Sat Su	n	Tota	al Time		Rat	e	Total
	Tota	al:													0					0
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There are 2 items highlighted at the top left:

- 1) An arrow to expand the screen as above
 - 2) The second is a tick box

Once you have confirmed you are happy with any hours that have been entered **tick the box** and **click on the Authorise button** (*top left*)

At this stage you can change the order number for the timesheet and also the invoice which will be created

To query the timesheet, **press the query button** and enter a message which will be sent to the Smith & Reed payroll department.

When finished click back on the home button (top left of the web screen)

Viewing & Downloading Invoices

From the side panel Click 'invoices' and 'download' :

Lates	t Invoices							
Downlo	d All 🔄 Export to PDF 🔀 Export to Excel							
Drag a co	lumn header and drop it here to group by that column							
	Invoice Code	Net 🔫	VAT 📍	Total	Year T	Period T	Date T	Download
•	0000000578	600	120	720	2020	23	04/09/2020	Download Preview
•	000000576	570	114	684	2020	22	03/09/2020	Download Preview

Click the **arrow to expand** your view, this will show all timesheets & workers related to the invoice:

In	nvoice Cod	de		T	Net	T	VAT T	Total	T	Year	Τ.	Period	Τ.	Date			T	Download	
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		Rates	BAC001:Daniel Svendser Expenses Job <unknown> Man</unknown>	Type Basici	Pay 4 Tue	'ime 0	Rate 15 Wed	Net 600	Auth Dani	n By IelSvendsen Thu		Start 31/08/2020 Fri	En 31)	d /08/2020 Sat	TS C	ode	Reports To Daniel Svendse	en Total	Order 123415

To download as a pdf press the download button on the right hand side

If you have a query with an invoice please message our finance department via the '**Contact Us'** Page or email us at <u>finance@smithandreed.co.uk</u>