

*make your
business* **flo**

Flo Software Solutions
User Guide
V6.7

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ICONS KEY

	Details
	Save
	View
	Edit
	Show Details
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	Revoke
	Add Candidate to Booking
	View Contract
	Upload Contract
	Download Contract
	Approve
	Authorise
	Unauthorise

	Activate Candidate
	Show Activation Information
	Show History
	Resolve
	Reissue Password
	User Roles
	Activate
	Close Invoice
	Add Net Deduction
	Download PDF
	Journal Invoice
	Ad Hoc Invoice
	Export CSV
	Rate History

Phone: [0844 322 1100](tel:08443221100)
email: support@flo.co.uk
Web: www.flo.co.uk

LOG IN DETAILS

Setting Password

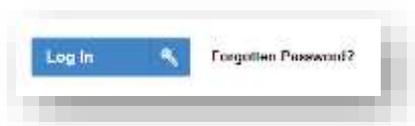
1. The URL for an agency's Instance of Flo is *YourAgency.flosolutions.co.uk*
2. A user's log in details will be sent via email upon activation.
3. Type in the username and one-time password given in the email.
4. Set your own password on the system, ensuring that the new password contains at least 8 characters with 1 letter and 1 number.



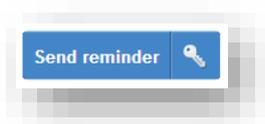
The screenshot shows the Flo login interface. At the top left is the 'flo' logo. To the right is a placeholder for a logo labeled 'Your Logo Here'. Below the logo is a 'User name' label and an input field. Underneath is a 'New Password' label and an input field. Below that is a 'Re-Type Password' label and an input field. At the bottom left of the form is a 'Log In' button with a magnifying glass icon.

Forgotten Password

1. To reset a password on Flo, click on the **Forgotten Password?** link on the log in screen.



2. Enter the email address and click **Send Reminder**.



3. Once the email is received, enter the one-time password and set new password ensuring that the new password contains at least 8 characters with 1 letter and 1 number.

DASHBOARD

When you first log onto Flo, you will be directed to the **Dashboard**. Here you will have access to the Flo Support contact details and an up-to-date User Guide.



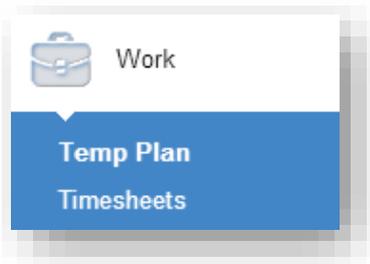
The Dashboard also contains a **Did You Know?** section with hints and tips on using the Flo system.



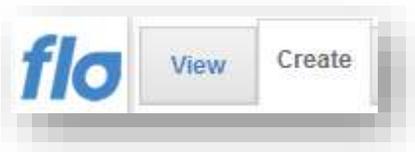
WORK

Creating a New Booking

1. On the menu, click on **Work** and then **Temp Plan**.



2. At the top of the page, click **Create**.



3. Complete the **Client** and **Business Unit** fields by typing in the box and selecting from the auto fill options available on the drop down list. You will only be able to create bookings for active Clients.

* Client: Care Client

* Business unit: Care Client - Liverpool

* Job category: Care Client - Liverpool

4. Select the job category from the pre-set list (job categories are set in the Client section – Page 52).

* Client: Care Client

* Business unit: Care Client - Liverpool

* Job category: Administrator

Administrator

Care Assistant

5. Use the boxes to enter any specific details about the booking, for example if there is any necessary experience required or health and safety risks.

Necessary experience, training, qualifications and any other authorisation, which the Client considers necessary or are required by law or by any professional body:

On site induction required

Any known health and safety risks and any steps the hirer has taken to reduce such risks:

- Select the **Start Date** for your booking. If the assignment is for a set duration, check the **End Date** box and select the date. If it is an open booking, leave the End Date box unchecked and the booking will continue to appear each week.

* Start date: 15 Feb 2016 End date

Start time: Feb 2016

* Weekdays

Mo	Tu	We	Th	Fr	Sa	Su
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29						

- To add the default start time onto the Temp Plan, click on the **Start time** box.

* Start date: 15 Feb 2016 End date

Start time: 08:00 End time:

* Weekdays

Hour		Minute		at	Sun					
00	01	02	03	04	05	00	05	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>
06	07	08	09	10	11	15	20	25		
12	13	14	15	16	17	30	35	40		
18	19	20	21	22	23	45	50	55		

- To define the default days of the week for this booking, select each day using the tick boxes.

* Weekdays: Mon Tue Wed Thu Fri Sat Sun

- When a job is being used at a location for the first time, the default rates will automatically be loaded. These can be changed and any changes that are made will be loaded next time a booking is made for this job category at this location.

The rates can be entered into the boxes in 2 ways:

- By typing manually into each box*:

Employment Cost: Numerically %

Shift	Rate type	Rules for allocation of hours	Pay Rate	NI	WTR	Pension	Add.	Work Cost	Agency Margin	Client Charge	
Standards	STD	Under	8.00	Per day, Mon-	7.50	0.00	0.00	0.00	7.50	2.14	9.64
Standards	OT	Above	8.00	Per day, Mon-	8.50	0.00	0.00	0.00	8.50	1.71	10.21

Add Load Default Rates

*The NI and WTR boxes provide an hourly average of these figures if required. These are not the actual figures that are calculated at payroll.

b) By entering the pay rate and calculating a percentage:

Shift	Rate type	Rules for allocation of hours	Pay Rate	%
Standa	STD	Under	8.00	Per day, Mon-
			7.50	0.00
Standa	OT	Above	8.00	Per day, Mon-
			8.50	0.00

Work Cost	Agency Margin	Client Charge
7.50	2.14	9.64
8.50	1.73	10.21

c) If Permanent Equivalent Rates (PERs) have been set up for this job, they will be visible under the temporary worker rates (PERs are edited in Settings – Page 66).

PER Rates:

Shift	Rate type	Rules for allocation of hours	Pay Rate	NI	WTR	Pension	Addit.	Work Cost	Agency Margin	Client Charge		
Standard	STD	Under	7.50	Per day, Mon-Sun	8.00	0.56	1.03	0.00	0.00	9.59	1.00	10.59
Standard	OT	Above	7.50	Per day, Mon-Sun	8.50	0.63	1.19	0.00	0.00	10.32	1.00	11.32

10. There are three ways of creating a booking: a) create an unfilled vacancy b) quickly assign a candidate, c) search through the available candidates and create multiple bookings.

a) To create a vacancy or multiple vacancies without immediately assigning a candidate, click on **Create Vacancy**, type the **No. of vacancies** in the box and click **Create Vacancies**.

* Assignment: Create Vacancy Find Candidates Quick Assign

* No. of vacancies:

Create vacancies

b) If there is a particular candidate to be placed on this booking, click **Quick Assign**, start typing their name in the **Candidate** box, select their name from the drop down list and click **Assign Candidate**.

* Assignment: Create Vacancy Find Candidates Quick Assign

* Candidates:

Joseph Dawson
Joe Morgan
John Newman
Tara Johnson

Create vacancies

- c) Alternatively, to select multiple candidates for this booking or find suitable candidates based on search criteria, click **Find Candidates**, type the **No. of Vacancies** required and click **Create Vacancies**.

* Assignment: Create Vacancy Find Candidates Quick Assign

* No. of vacancies

[Create vacancies](#)

11. The Flo system will select a list of candidates that match the criteria for this job, i.e. correct RTW documentation, compliance items and job categories. To select candidates for this booking, check the box on the left next to the candidate's name. This candidate will be moved to the top to allow you to select the remaining candidates to fill the booking slots.

2 VACANCIES / 1 SELECTED CANDIDATE [Send SMS](#) [Download CSV](#) [Assign](#)

Name	Contact	Employment Type	Over 25	Compliances	Jobs	Skills	Availability	Distance	Action
<input checked="" type="checkbox"/> Elizabeth Bost	lizybost@gmail.com 07784 193635	PAYE (with your agency)	Y	-	-	-	\$1000	1 mi	+
<input type="checkbox"/> Tom Martins	tom.martins@saboo.co.uk 07796 406935	PAYE (with your agency)	Y	-	-	-	\$400	2 mi	
<input type="checkbox"/> John Newman	johnnewman_24@hotmail.co.uk 07470 975103	PAYE (with your agency)	N	-	-	-	\$400	2 mi	
<input type="checkbox"/> Ben Turner	ben.turner@flox.com 07991 498325	PAYE (with your agency)	Y	-	-	-	\$400	1 mi	

12. To change the filter options, edit the search criteria in the relevant boxes and click **Search**. By default, the system will search against the criteria set up in the Client settings.

13. All candidates selected for this booking will be added at the rates previously entered. If a bespoke rate is required for one candidate, click on the + button at the right of the row to **Add Custom Rate**. If the Pay Rate is changed, the Client Charge rate will also need updating.

Name	Contact	Employment Type	Over 25	Compliance	Jobs	Skills	Availability	Distance	Actions			
<input checked="" type="checkbox"/> Elizabeth Boyle	bozboyle@gmail.com 07784 193635	PAVE (with your agency)	Y	2	1	-	8:00	1 mi				
Shift	Rate Type	Rules For Allocation Of Hours			Pay Rate	NI	WTR	Pension	Addl.	Work Cost	Agency Margin	Client Charge
Day	STD	Under	8.00	Per Day, Mon-Fri	8.00	0.00	0.00	0.00	0.00	8.00	2.64	10.64
Day	OT	Above	8.00	Per Day, Mon-Fri	9.00	0.00	0.00	0.00	0.00	9.00	2.79	11.79

Cancel Custom Rates

14. Once all the rates have been entered correctly, click on the **Assign** button to create assign the candidates to the vacancies.



15. Once a candidate has been assigned to a vacancy, they will show on the Temp Plan in amber (pending confirmation). A timesheet will only be created once a candidate has been accepted.

<input type="checkbox"/>	Business Unit	Job Category	Start Date	End Date	Candidate	Compliance Status	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Actions
<input type="checkbox"/>	Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	Elizabeth Boyle									
<input type="checkbox"/>	Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	Tom Martin									

16. To confirm a candidate onto a vacancy, click **Accept Candidate**.

<input type="checkbox"/>	Business Unit	Job Category	Start Date	End Date	Candidate	Compliance Status	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Actions
<input type="checkbox"/>	Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	Elizabeth Boyle									 Accept Candidate
<input type="checkbox"/>	Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	Tom Martin									

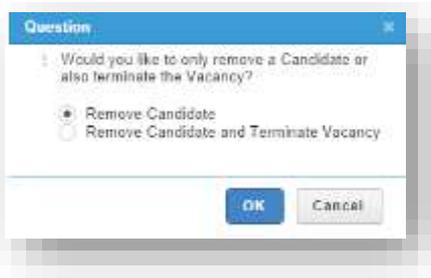
17. The vacancy will now turn green so the timesheets and assignment schedule will be created.

<input type="checkbox"/>	Business Unit	Job Category	Start Date	End Date	Candidate	Compliance Status	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Actions
<input type="checkbox"/>	Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	Elizabeth Boyle									
<input type="checkbox"/>	Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	Tom Martin									

18. To remove a candidate from a vacancy, click on **Revoke**.

<input type="checkbox"/>	Business Unit	Job Category	Start Date	End Date	Candidate	Compliance Status	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Actions
<input type="checkbox"/>	Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	Elizabeth Boyle									
<input type="checkbox"/>	Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	Tom Martin									

- There are two options when clicking revoke: a) Remove Candidate b) Remove Candidate and Terminate Vacancy



a) **Remove candidate** will return the vacancy to an “unfilled” status (in red).

Business Unit	Job Category	Start Date	End Date	Candidate	Compliance Status	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Actions
Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	Elizabeth Boyle									
Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	Unfilled									

b) **Terminate Vacancy** will completely remove the vacancy from the Temp Plan.

Business Unit	Job Category	Start Date	End Date	Candidate	Compliance Status	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Actions
Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	Elizabeth Boyle									
Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	Unfilled									

The vacancy will turn black, but will disappear once the page has been refreshed.

19. To edit the start time for a day on the Temp Plan, click on the time under the day box.



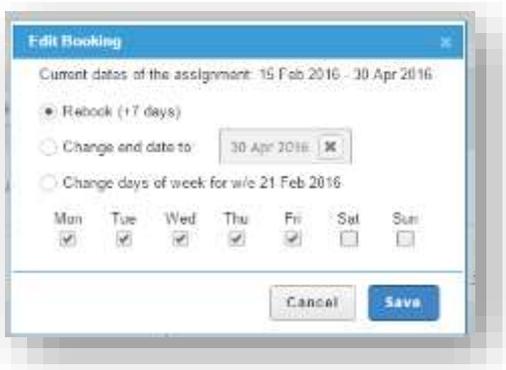
Editing a Booking

1. To change the end date for a booking, click on the **Edit** button.



<input type="checkbox"/>	Business Unit	Job Category	Start Date	End Date	Candidate	Compliance Status	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Actions
<input type="checkbox"/>	Care Client - Liverpool	Administrative	30 May 2016	3 Jun 2016	Elizabeth Boyle									

2. This will give you two options for editing the end date: a) Rebook (+ 7 days) b) Change end date
a) Rebook (+ 7 days)



Edit Booking

Current dates of the assignment: 15 Feb 2016 - 30 Apr 2016

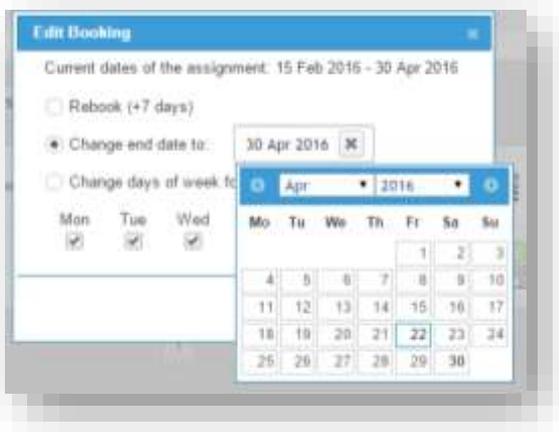
Rebook (+7 days)

Change end date to: 30 Apr 2016

Change days of week for w/e 21 Feb 2016

Mon Tue Wed Thu Fri Sat Sun

- b) Change end date



Edit Booking

Current dates of the assignment: 15 Feb 2016 - 30 Apr 2016

Rebook (+7 days)

Change end date to: 30 Apr 2016

Change days of week for w/e 21 Feb 2016

Mon Tue Wed

Calendar: Apr 2016

Mo	Tu	We	Th	Fr	Sa	Su
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

- c) Change days of week for current week

Edit Booking

Current dates of the assignment: 15 Feb 2016 - 30 Apr 2016

Rebook (+7 days)

Change end date to: 30 Apr 2016

Change days of week for w/e 21 Feb 2016

Mon	Tue	Wed	Thu	Fri	Sat	Sun
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Cancel Save

Cloning a Booking

1. To clone a booking on the Temp Plan, click on **Clone Booking**.

<input type="checkbox"/>	Business Unit	Job Category	Start Date	End Date	Candidate	Compliance Status	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Actions
<input type="checkbox"/>	Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	Rosebeth Beale		8:30-17:30	8:30-17:30	8:30-17:30	8:30-17:30	8:30-17:30			

2. Enter the details for the new booking and click **Save**.

Clone Booking

You are about to clone a Booking for Care Client - Liverpool - Administrator, please specify new dates of this Booking

* Start Date: End Date:

Start Time: End Time:

* Weekdays: Mon Tue Wed Thu Fri Sat Sun

* No. of bookings:

Cancel Save

3. New Vacancies will appear unfilled on the Temp Plan.

<input type="checkbox"/>	Business Unit	Job Category	Start Date	End Date	Candidate	Compliance Status	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Actions
<input type="checkbox"/>	Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	Unfilled		8:30-17:30	8:30-17:30	8:30-17:30	8:30-17:30	8:30-17:30			
<input type="checkbox"/>	Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	Unfilled		8:30-17:30	8:30-17:30	8:30-17:30	8:30-17:30	8:30-17:30			
<input type="checkbox"/>	Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	Unfilled		8:30-17:30	8:30-17:30	8:30-17:30	8:30-17:30	8:30-17:30			

Notes on Bookings

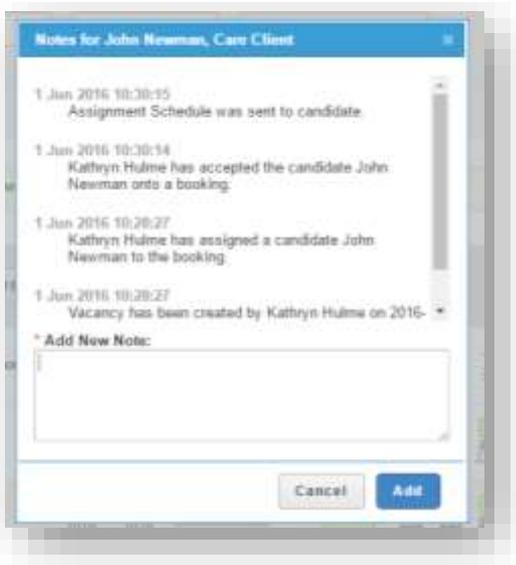
Whenever any action is taken on the Booking, the system will save the changes in the Notes.

1. To view the actions on the Bookings, click on the **Notes** button.



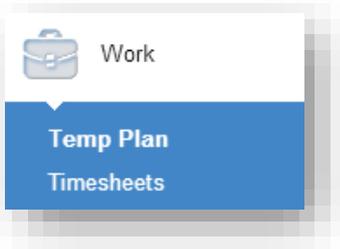
<input type="checkbox"/>	Business Unit	Job Category	Start Date	End Date	Candidate	Compliance Status	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Actions
<input type="checkbox"/>	Care Client - Liverpool	Administrator	30 May 2016	3 Jun 2016	John Newman									

2. Notes are automatically added with every action and can also be added manually.



Editing a Timesheet

1. On the menu, click on **Work** and then **Timesheets**.



- The **Current Timesheets** tab will show all the timesheets that have not transacted yet, including all timesheets for the current week plus any historic timesheets that have only just been added
 - The **Archived Timesheets** tab will show all timesheets that have ever transacted from the first week's consolidation.
2. On the Current Timesheets tab, select the Client name, use the filter boxes to find the specific timesheet and click **Search**.

- To enter hours in the timesheets, click on the relevant day and enter the total number of hours the candidate worked on that day (after deducted breaks).
 - The timesheets work in decimals, so for 15 minutes enter 0.25, for 30 minutes enter 0.5 hours and for 45 minutes enter 0.75.
 - The total hours and cost for each timesheet will automatically calculate on the right hand side based on the rates and rules that were set at the booking stage.
 - If the hours on any day go over the warning, they will turn orange but the timesheet can still be saved.
 - If the hours for any day go over the limit, they will turn red and the timesheet cannot be saved.

		Download CSV	Approve	Clear Hours	Set Standard Week	Send SMS	Save														
<input checked="" type="checkbox"/>	Candidate	Job Category	Grade	Shift	Week Ending	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours	Total Cost	Status	Actions					
<input checked="" type="checkbox"/>	Elizabeth Beale	Administrator	*	Day	05 Jun 2016	8.00	8.00	8.00	8.00	7.00	0.00	0.00	39.00	414.96	active	[Icons]					
<input checked="" type="checkbox"/>	Tom Martins	Administrator	*	Day	05 Jun 2016	4.00	7.50	8.00	8.00	8.00	0.00	0.00	35.50	377.72	active	[Icons]					
<input checked="" type="checkbox"/>	John Newman	Administrator	*	Day	05 Jun 2016	8.00	8.00	8.00	11.00	7.50	0.00	0.00	43.50	467.44	active	[Icons]					
<input checked="" type="checkbox"/>	Ben Turner	Administrator	*	Day	05 Jun 2016	7.50	7.00	7.50	8.00	7.00	0.00	0.00	37.00	393.68	active	[Icons]					

- If a candidate or group of candidates work the same hours every week, it is possible to enter the hours at the touch of a button. Select which timesheets should have standard hours by clicking the box on the left of the row and click the **Set Standard Week** button.

Candidate	Job Category	Grade	Shift	Week Ending	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours	Total Cost	Status	Actions
John Newman	Administrator	★	Day	05 Jun 2016	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	active	[Icons]

- This will automatically enter the hours into the selected timesheets.

Candidate	Job Category	Grade	Shift	Week Ending	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours	Total Cost	Status	Actions
John Newman	Administrator	★	Day	05 Jun 2016	7.50	7.50	7.50	7.50	7.50	0.00	0.00	37.50	300.00	active	[Icons]

- To view the rate and rules for this booking, click on the **Job Category** on the timesheet. On this example, whenever more than 8 hours have been entered onto a day then the additional hours above 8 will be automatically calculated at the overtime rate.

Rates and Rules

Warning: 8.00 units

Limit: 10.00 units

STD: value: £10.64
Under 8.00 units Per Day, Mon-Fri

OT: value: £11.79
Over 8.00 units Per Day, Mon-Fri

[OK](#)

- The candidates can be graded on their timesheet for their level of work that week using the 5 star grading system. Hover over the star on the timesheet and select a grade for that week. An average grade will be stored for that candidate.

Candidate	Job Category	Grade	Shift	Week Ending	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours	Total Cost	Status	Actions
Elizabeth Boyle	Administrator	★★★★★	Day	24 Jan 2016	7.50	7.50	7.50	7.50	7.50	0.00	0.00	37.50	301.50	active	[Icons]

- To view the details for a timesheet, click on the **Details** button at the right hand side of the row.

Candidate	Job Category	Grade	Shift	Week Ending	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours	Total Cost	Status	Actions
Elizabeth Boyle	Administrator	★	Standard	24 Jan 2016	7.50	7.50	7.50	7.50	7.50	0.00	0.00	37.50	301.50	active	[Icons]

<input checked="" type="checkbox"/>	Elizabeth Boste	Administrator	★	Standard	24 Jan 2016	7.50	7.50	7.50	7.50	7.50	0.00	0.00	37.50	361.50	active			
Bonus		NI	Margin	Total	Expenses:				Override Rules: <input type="checkbox"/>		STD: 37.50	OT: 0.00						
0.00		+ 0.00	+ 0.00	= 0.00	0.00													

- To override the rules, check the **Override Rules** box and manually enter the total hours that should be paid at each rate band. The total hours in the details section must match the total hours on the timesheet otherwise they will show in red and will not save.

<input checked="" type="checkbox"/>	Elizabeth Boste	Administrator	★	Standard	24 Jan 2016	7.50	7.50	7.50	7.50	7.50	0.00	0.00	37.50	351.00	active			
Bonus		NI	Margin	Total	Expenses:				Override Rules: <input checked="" type="checkbox"/>		STD: 38.50	OT: 0.00						
0.00		+ 0.00	+ 0.00	= 0.00	0.00													

- **Bonuses** and **expenses** can be processed with the timesheet.

<input checked="" type="checkbox"/>	Elizabeth Boste	Administrator	★	Standard	24 Jan 2016	7.50	7.50	7.50	7.50	7.50	0.00	0.00	37.50	420.70	active			
Bonus		NI	Margin	Total	Expenses:				Override Rules: <input type="checkbox"/>		STD: 37.50	OT: 0.00						
50.00		+ 0.00	+ 2.00	= 52.00	15.00													

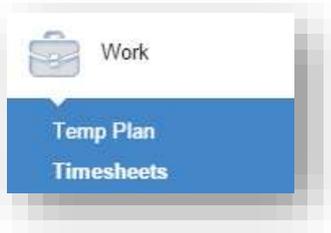
4. Save each individual timesheet using the **Save** button on the right of the row.
- A timesheet can be edited and saved as many times as required up to the point of consolidation. The data in the timesheet at the point of consolidation is what will be shown on the Client invoice.
 - To save multiple timesheets at the same time, check the boxes on the left of the rows that need saving and click **Save**.

<input type="button" value="Download CSV"/>		<input type="button" value="Approve"/>		<input type="button" value="Clear Hours"/>		<input type="button" value="Set Standard Week"/>		<input type="button" value="Send SMS"/>		<input type="button" value="Save"/>										
<input checked="" type="checkbox"/>	Candidate	Job Category	Grade	Shift	Week Ending	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours	Total Cost	Status	Actions				
<input checked="" type="checkbox"/>	Elizabeth Boste	Administrator	★	Standard	24 Jan 2016	7.50	7.50	7.50	7.50	7.50	0.00	0.00	37.50	420.70	active					
<input checked="" type="checkbox"/>	John Newman	Cleaner	★	Standard	24 Jan 2016	4.50	4.50	5.00	5.00	4.50	0.00	0.00	24.50	238.63	active					
<input checked="" type="checkbox"/>	Ben Turner	Cleaner	★	Standard	24 Jan 2016	4.50	4.50	0.00	4.50	4.00	0.00	0.00	17.50	170.45	active					

Bulk Timesheet Upload

Timesheets can be uploaded in csv format into Flo. The timesheet csv can either be downloaded from Flo or can come from other sources as long as the information matches exactly the information in Flo.

1. On the menu, click on **Work** and then **Timesheets**.



2. Use the filters to select the client and click **Download CSV**. This will download all the timesheets for the selected filters or if the tick boxes are checked then all the selected timesheets.



3. Enter the hours per day that each candidate worked. It is also possible to record absences using the NASH values. The columns with titles Candidate, Business Unit, Job Category, Grade, Shift and Week ending must be present (can be empty) or the upload won't work.

Timesheet	Candidate	Candidate Business	Job Category	Grade	Shift	Week end	Mon	Tue	Wed	Thu	Fri	Sat	Sun
91073	TN 28 12 8	Mark Ade	Warehouse	Canteen P	0 Nights	18-Oct-15	0	0	8.5	9	8	8	0
91075	JK 40 05 4	Peter Bari	Warehouse	Fresh Good	0 Nights	18-Oct-15	9	8	8	8	8	0	0
91074	JM 06 24 1	David Blal	Warehouse	Canteen P	0 Nights	18-Oct-15	0	0	0	0	0	0	0
91071	JM 50 73 9	Ryan Dayt	Warehouse	Canteen E	0 Days	18-Oct-15	0	8.5	5	5	0	0	0
91072	JW 57 67 3	Robert Do	Warehouse	Freezer N	0 Nights	18-Oct-15	8	8	0	0	0	0	0
91077	SN 43 35 3	Ben Greg	Warehouse	Freezer N	0 Nights	18-Oct-15	8	7.25	0	0	0	0	0
91078	SC 67 21 6	Thomas K	Warehouse	Fresh Good	0 Nights	18-Oct-15	0	0	0	8	8	8	8
91075	NR 86 57 3	David Low	Warehouse	Canteen P	0 Nights	18-Oct-15	0	0	8.5	9	8.75	8	0

4. Save the spreadsheet in csv format.
5. On Flo, click on the **Bulk Upload** section on the Timesheets page.

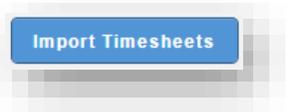


6. Click on **Choose CSV File**.



No file selected Choose CSV file

7. Select the file for importing and click **Import Timesheets**.



Import Timesheets

8. Once the file has been imported, there are 4 statuses:

- **No Changes** – no data has been changed on the csv since the download
- **No Conflicts** – the data entered onto the csv does not conflict with the existing data in the timesheets
- **Conflicts** – the data entered onto the csv conflicts with the existing data in the timesheets and must be checked before uploading
- **Error** – there was an error with the information and this must be imported again



NO CHANGES	NO CONFLICTS	CONFLICTS	ERRORS
7	2	1	1

9. To confirm the conflicts, click **Overwrite Conflicts**.



Overwrite Conflicts Save

10. To upload the imported information to the timesheets, click **Save**. This will save all the timesheets that do not have any conflicts or errors.



Importing 100%

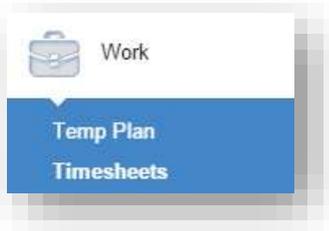
Overwrite Conflicts Save

11. The data will now be saved on the Flo timesheets page ready for approval and authorisation.

Archived Timesheets

To view or edit a timesheet that has already transacted through the system go to the **Archived Timesheets** tab.

1. On the Menu go to **Work, Timesheets** and click on the **Archived Timesheets** tab at the top of the page.



2. Use the filter boxes at the top of the page to find the specific timesheet that needs editing.

A screenshot of a web application interface for 'Archived Timesheets'. At the top, there are tabs for 'Current Timesheets', 'Archived Timesheets', and 'Authorise'. A search bar is on the right with 'Support: support@flo.co.uk 0844 322 1100'. Below the tabs, there are filter boxes for 'CANDIDATE', 'CLIENT', 'BUSINESS UNIT', 'JOB CATEGORY', and 'WEEK ENDING'. The 'CLIENT' dropdown is open, showing options like 'Safety Client', 'Care Client', 'Logistics UK', and 'Supermarket'. A 'Go to' field with a 'Go' button and pagination controls are also visible. A 'Clear' button and a 'Search' button are at the bottom right. A green badge indicates '40 TIMESHEETS'.

3. On the right of the timesheet row, click on the **Adjust** button.

A screenshot of a table showing timesheet data. The table has columns for Candidate, Job Category, Grade, Shift, Week Ending, and days of the week (Mon-Sun), followed by Total Hours and Total Cost. The first row is for 'Ben Turner', Administrator, Grade 4, Shift 9H, Week Ending 12 Jan 2014. The 'Status' column shows 'Archiv' and the 'Actions' column has an 'Adjust' button circled in green. Below the main table, there are rows for 'Original Values', 'Current Values', 'Differences', and 'New Values', each with input fields for Bonus, NI, Margin, Expenses, and days of the week, plus Total Hours and Total Cost. At the bottom, there are 'Override Rules' for STD (0.00) and OT (0.00).

4. Fill out the **New Values** row with the hours that the candidate actually worked and click **Save**. The new Total Hours and Total Cost will be calculated on the right of the row, as well as the difference in the hours and cost.

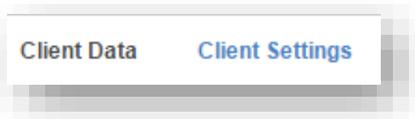
Candidate	Job Category	Grade	Shift	Week Ending	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours	Total Cost	Status	Actions	
<input type="checkbox"/> Ben Turner	Administrator	*	Std	12-Jan-2014	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Archive		
	Bonus	NI	Margin	Expenses	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours	Total Cost			
Original Values:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
Current Values:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
Differences:	0.00	0.00	0.00	0.00	+7.50	+7.50	+7.50	+7.50	+7.00	0.00	0.00	+37.00	+370.00			
New Values:	0.00	0.00	0.00	0.00	7.50	7.50	7.50	7.50	7.00	0.00	0.00	37.00	370.00			
													Override Rules <input type="checkbox"/>	STD: 37.00	OT: 0.00	
														Cancel	Save	

The difference in cost will be added/deducted from the next Client invoice as appropriate.

PO Numbers

Recording PO Numbers against particular bookings/timesheets does not produce invoices by PO, but allows reporting to take place.

1. On the menu, go to the **Clients** section, find the Client and click on Client Settings.



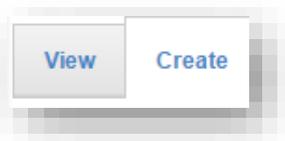
2. Click the **“Operate PO System”** checkbox.

Operate PO System:

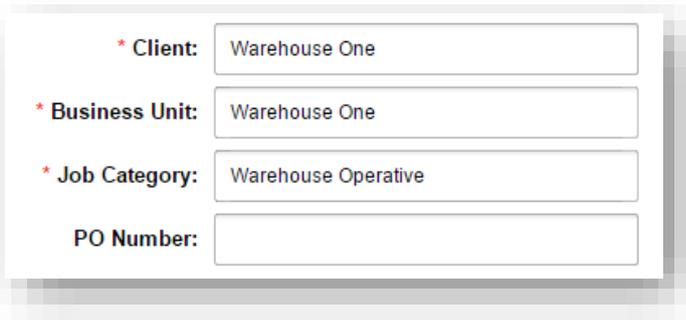
Notes:

Credit Limit:

3. Go to **Work** and **Temp Plan** and click on **Create**.



4. Type the name of the Client, Business Unit and Job Category, and the PO Number field appears.



* Client: Warehouse One

* Business Unit: Warehouse One

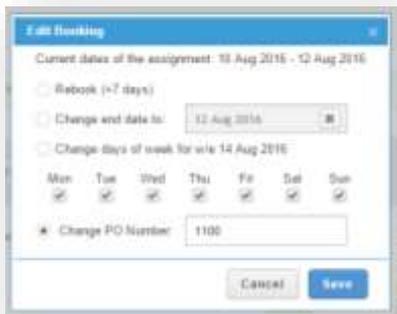
* Job Category: Warehouse Operative

PO Number:

5. Once the booking has been created, the PO number can be added/edited by clicking on the Edit icon.



6. Click on the **Change PO Number** radio button, edit the number and click Save.



Current dates of the assignment: 10 Aug 2016 - 12 Aug 2016

Rebook (>7 days)

Change end date to: 12 Aug 2016

Change days of week for w/e 14 Aug 2016

Mon Tue Wed Thu Fri Sat Sun

Change PO Number: 1100

Cancel Save

7. On the Timesheets, click on the details button.

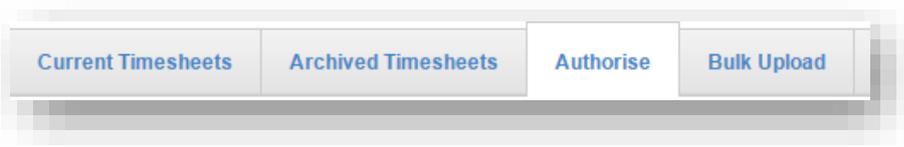


8. Edit the PO Number for that particular timesheet and click **Save**.

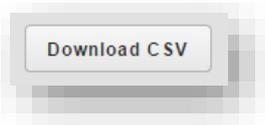


Bonus	NI	Margin	Total	Expenses	PO Number	Override Rules	STD
0.00	+ 0.00	= 0.00	= 0.00	0.00	1100	<input type="checkbox"/>	0.00

9. To check which Timesheets have a completed PO Number, go to the **Authorise** page.



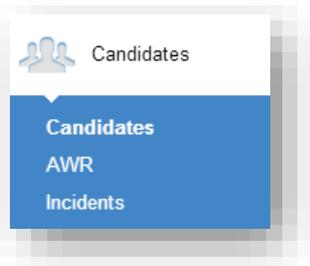
10. Click on **Download CSV**.



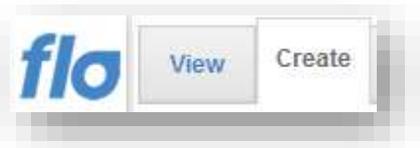
CANDIDATES

Creating a New Candidate

1. On the menu, go to the **Candidates** section.



2. At the top of the page, click on **Create**.



3. Select which Agency Branch the candidate is registered with and fill in all mandatory fields (marked with *).

CREATE A NEW CANDIDATE

Employment Details

* Agency Branch:	Please select value
* Forename:	Leeds
Other names:	Logistics
* Surname:	Logistics
* Gender:	Macclesfield
* Date of Birth:	Ormskirk
* Address 1:	Prestbury
	Widnaw

- To enter the Date of Birth, click on the box and first select the **Year**.

* Date of Birth:	Jan	1999			
* Address 1:	Su	Mo	Tu	W	Sa
* Address 2:					
Address 3:	3	4	5		
* Postcode:	10	11	12		
* Country:	17	18	19		
Telephone:	24	25	26		
	31				

- The NI Number must be valid. Temporary Numbers (TN) are can be used, but must match the DOB and Gender of the candidate.

Candidate NI & Passport Details

* NI Number:	<input type="text"/>				
Passport Number:	<input type="text"/>				
Issuing Country:	<input type="text"/>				

- Once all the fields have been completed, click **Save Candidate**.

Save Candidate

- Select the candidate's country of origin by typing in the box and clicking **Save**.

NEW RIGHT TO WORK FILE ELIZABETH BOYLE

Please note that EU Accession State countries are subject to different Right to Work rules than other EEA countries (and Switzerland)

Country: *

United
Tanzania, United Republic Of
United Arab Emirates
United Kingdom
United States
United States Minor Outlying Islands

Back to Candidates

Save

8. Click on **Add a Document**.

✓ Right to Work file created successfully

VIEWING RIGHT TO WORK FILE ELIZABETH BOYLE

Document combinations that form a valid excuse from liability: UK Right To Work Document Combinations

Country: United Kingdom

No documents stored in this file

Back to Candidates

Revoke this File

Add a Document

9. From the dropdown menu, select the type of Right to Work file to be uploaded for this candidate.

NEW RIGHT TO WORK DOCUMENT ELIZABETH BOYLE

Type: *

Common Travel Area Adapter Certificate
UK Adaption Certificate
UK BVI Certificate
UK Home Office Status Letter (Indefinite Leave)
UK Immigration Status Document (Indefinite Leave)
UK National Insurance Identification
UK Passport
UK Permanent Residence Card or Document (EA)

An adaption certificate issued in the Channel Islands, the Isle of Man or Ireland.

Requires: UK National Insurance Identification

10. Fill out the details required for this document, including the **Date of Issue**, the **Next Check Date** and the **Recheck Period**.

NEW RIGHT TO WORK DOCUMENT ELIZABETH BOYLE

Type:

Date of Issue: no date of issue

Next Check Date: never check

Recheck Period:

A passport showing that the holder, or a person named in the passport as the child of the holder, is a British citizen or a citizen of the United Kingdom and Colonies having the right of abode in the United Kingdom.

11. Click on **Choose File** to upload an attachment and click **Save** once uploaded.

Document File: Max filesize: 10 MB
Allowed types: pdf, ppt, pptx, jpeg, jpg, gif, png, doc, docx

Remember to check photographs, dates of birth, expiry dates and names.
Always look for signs of tampering.

12. A green message will appear at the top of the Right to Work page indicating that the document satisfies the requirements.

Candidate | Employment Details | Compliance Items | **Right To Work** | Master Contracts | Other Contracts | Availability

A single document in this file satisfies UK Right to Work requirements.

RIGHT TO WORK FILES OF: ELIZABETH BOYLE

Document combinations that form a valid excuse from liability: [UK Right To Work Document Combinations](#)

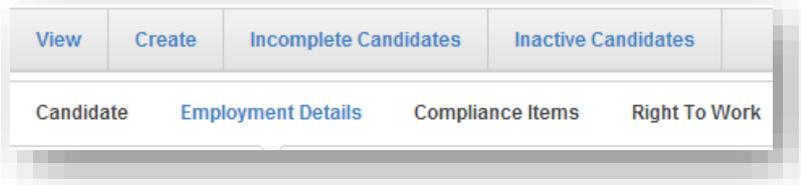
Country: United Kingdom

Editing a Candidate

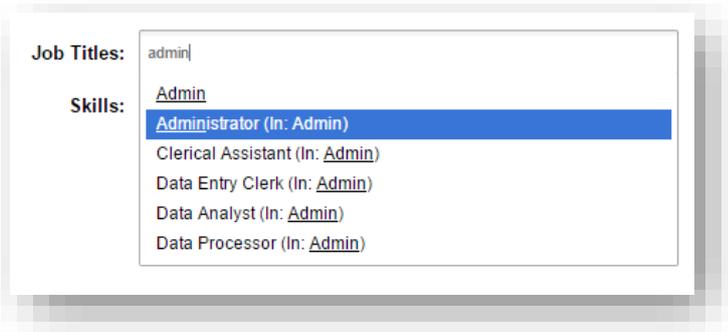
1. To edit a candidate's details, click on the candidate's name or on the **edit** button at the right of the row.

Name	Business Unit	Mobile Number	E-mail	Grade	Incidents	Right to Work	Compliance Items	Availability from 01 Sep 2014							Actions
								Mon	Tue	Wed	Thu	Fri	Sat	Sun	
Elizabeth Boyd	Fle Demo - Bristol Branch	07794 457974	liz.boyd@rahus	0	0										

2. To edit the **Employment Details**, click on this tab at the top of the page.



3. To add a **Job Title**, start typing in the box and select from the dropdown list which is prefilled from the Dictionary*.



*If you have permission to edit the Job Titles dictionary, you can add new Job Titles from this page by typing into the box and saving the entry. This will also add the Job Title to the Dictionary.



4. Use the boxes to edit the drop down options for the candidate's travel and pay and click **Save**.

Mode of Travel:

Travel Range:

Min. Pay:

Per Hour Per Day

Grade: ★★★★★

5. To add Client Restrictions to a candidate, click on **Create Restriction**.

CLIENT RESTRICTIONS

Client	Business Unit	Restricted By	Date Restricted	Reason	Actions
No Restrictions found.					

6. Type the name of the Client and Business Unit (if required), use the Reason box to type a description and click **Add**.

Restrict this candidate from selected client ✕

Choose a client for which Elizabeth Boyle will be restricted.

* Client:

Business Unit:

Reason:

7. This Candidate will now be blocked from bookings for this Client.

BOOKING FOR: ELIZABETH BOYLE

* Client:

* Business Unit: Other Location:

* Job Category: This candidate is not allowed to be added onto a booking for this Client.

* Assignment: Create Vacancy
 Find Candidates
 Quick Assign

* Candidates:

This candidate is not allowed to be added onto a booking for this Client.

Name	Contact	Employment Type	Over 25	Compliance	Jobs	Shifts	Availability	Debitals	Actions
<input type="checkbox"/> Elizabeth Boyle		PROV (with your agency)	Y	-	-	-	100%	7 hr	<input type="button" value="Assign"/>

This candidate is not allowed to be added onto a booking for this client.

Items per page: 10

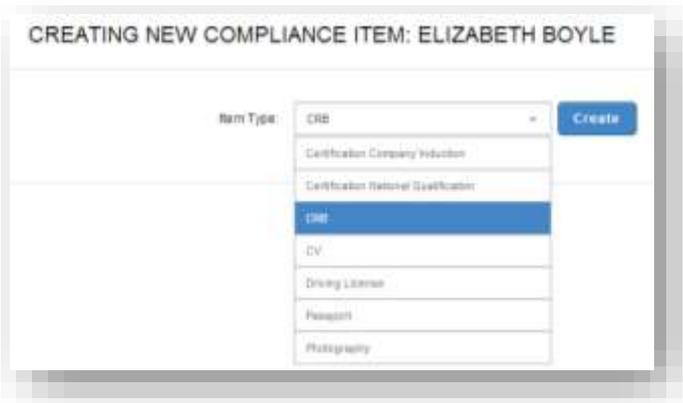
Compliance Documents

1. To edit the **Compliance Items**, click on this tab at the top of the page.

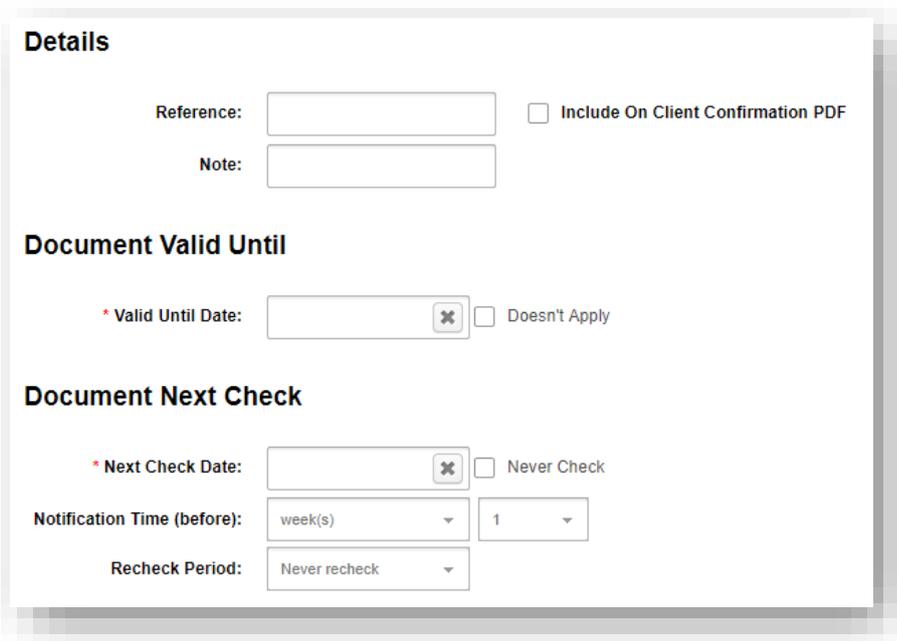
2. Click on **Create a Compliance Item**.

COMPLIANCE ITEMS OF: ELIZABETH BOYLE

3. Select the type of Compliance Item from the dropdown list (to create a bespoke Compliance Item, go to the Settings section on the Menu – Page 65).



4. Fill out the details required on the form, including the **Title**, **Valid Until Date** and **Next Check Date**.



5. Upload the document and click **Save**. It is possible to upload multiple files for the same Compliance Item.



6. Once completed, a valid Compliance Item will show as green.

COMPLIANCE ITEMS OF: ELIZABETH BOYLE

Ad Hoc Booking



New Compliance created successfully.

Revoke

Mark as Checked

Create a Compliance Item

Type	Reference	Additional Info	Next Check	Last Check	Valid Until	Status	Actions
<input type="checkbox"/> Admin - Typing	Admin - Typing	No file uploaded	N/A	Never checked	N/A	✔	
<input type="checkbox"/> DBS Check	DBS	jpg 13.18 KB	10 Sep 2014, recheck every 3 months	Never checked	10 Jun 2015	✔	

Availability

1. A candidate's 7 day availability can be seen from the candidate view page. The page will show the next 7 days starting from today's date.

AWR	Name	Business Unit	Mobile Number	E-mail	Grade	Incidents	Right to Work	Compliance Items	Availability from 01 Sep 2014							Actions
									Mon	Tue	Wed	Thu	Fri	Sat	Sun	
✔	Paul Abdul	Flo Demo - Salford Branch	07784 244547	paul.abdul@flo	4	1	✔	✘	■							
✔	Muhammad Abdul	Flo Demo - Liverpool Branch	07784 148412	m.abdul1274@f	0	1	?	✔	■	■	■					
✘	John Adrian	Flo Demo - Bristol Branch	07745 154988	john.adrian@f	4	1	✔	✘	■							
✔	David Ashton	Flo Demo - Salford Branch	07932 155784	d.ashton@fodms	4	0	✔	✔	■							

2. To change the start date, use the filter box at the top of the page.

SHOW AVAILABILITY FROM:

15 Feb 2016

Feb 2016

Mo	Tu	We	Th	Fr	Sa	Su
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29						

- To edit a candidate's availability, or to view the full availability calendar, click on any of the availability boxes in the days of the week.



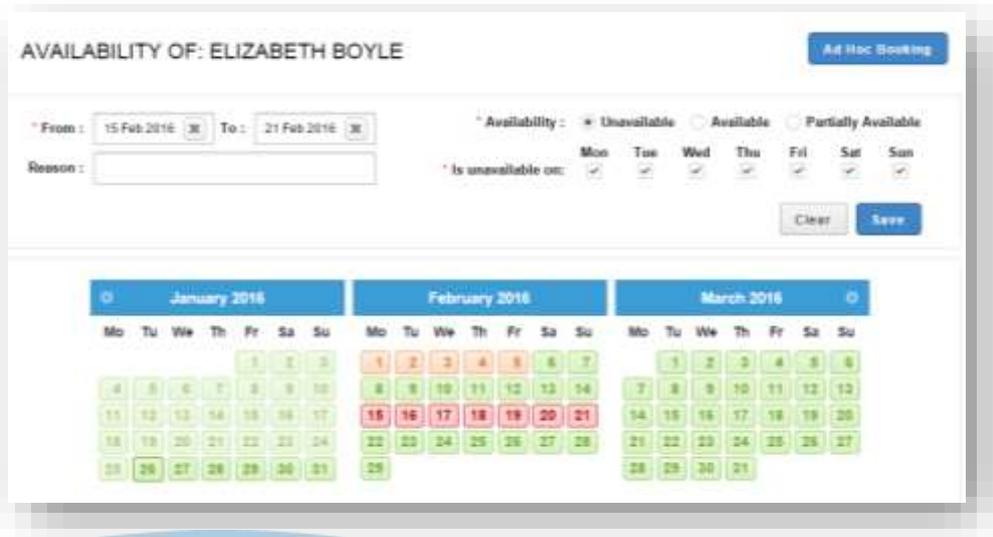
- The calendar shows a 3 month view, starting by default from the current month.



- There are 3 options for setting the Availability:

- Available
- Unavailable
- Partially Available

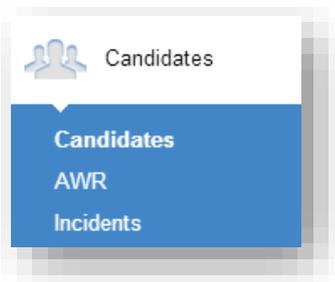
- To record a new period in the calendar, click on the day the period starts and the day the period ends. If the period is just for one day, click on the day twice. This will populate the date boxes in the form at the top of the page. Select Unavailable, Available or Partially Available and click **Save**.



- To select availability for certain days of the week, click on the period and leave the relevant day boxes checked. This will update the checked boxes for the period selected.

Adding Notes to a Candidate

- On the Menu, go to the **Candidates** section and click on **Candidates**.



- To edit a candidate's details, click on their name or the **edit** button at the right of the row.



- Scroll down to the bottom of the record to the Notes section and click **Create New Thread**.



4. Type the **Title** of the Thread and add the details to the **Note** section.



5. To add further notes to the same Thread, click on the **View** button.

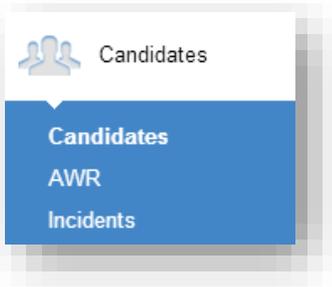


6. When there are multiple notes threads for the same candidate, it is possible to make certain threads "**Sticky**", which means that they will always appear at the top of all the threads.



Adding a Signed Contract

1. On the Menu, go to the **Candidates** section and click on **Candidates**.



2. Find the row of the Candidate that needs a contract uploading and Click on the **Contract** icon.



3. Click on the **Upload Contract** icon on the right of the row.

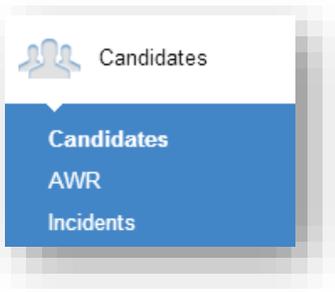


4. Choose a file to upload and click on **Upload Signed Contract**.



Deactivating a Candidate

1. On the Menu, go to the **Candidates** section and click on **Candidates**.



2. To make a candidate inactive, click on the **Deactivate** button at the end of the row.



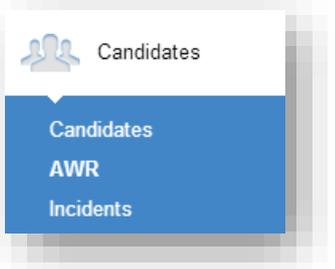
AWR

The Flo system tracks the candidate's work history to comply with the AWR. Using a traffic light system, it is quick and easy to see which candidates' records need immediate attention.

AWR	Client	Candidate	AWR Weeks	Periods	Total Weeks	Flag	Actions
■	Bakery Client	Nell McCormick	13	8 periods	31	—	
■	Bakery Client	Megan Fax	8	5 periods	13	—	
■	Care Client	Charles Stewart	2	2 periods	4	—	

Defining Break Types

1. On the menu, click on **Candidates** and **AWR**.



2. Use the filter boxes at the top of the page to find a specific AWR record.

OVERDUE 0 URGENT 1 REGULAR 30

CANDIDATE: Taylor

ONLY SHOW ACTIVE CANDIDATES:

CLIENT: All STATUS: All FLAG: All

1 AWR RECORD

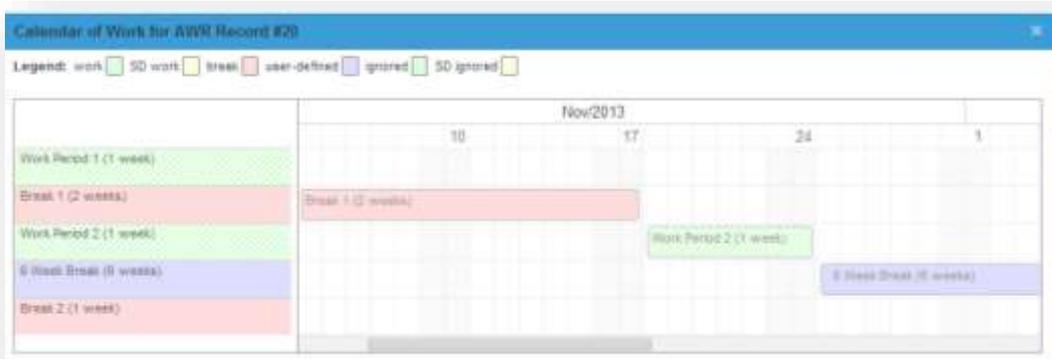
Download CSV

AWR	Client	Candidate	AWR Weeks	Periods	Total Weeks	Flag	Actions
	Craig's Coffee House	Sarah Taylor	0	1 periods	10	-	 

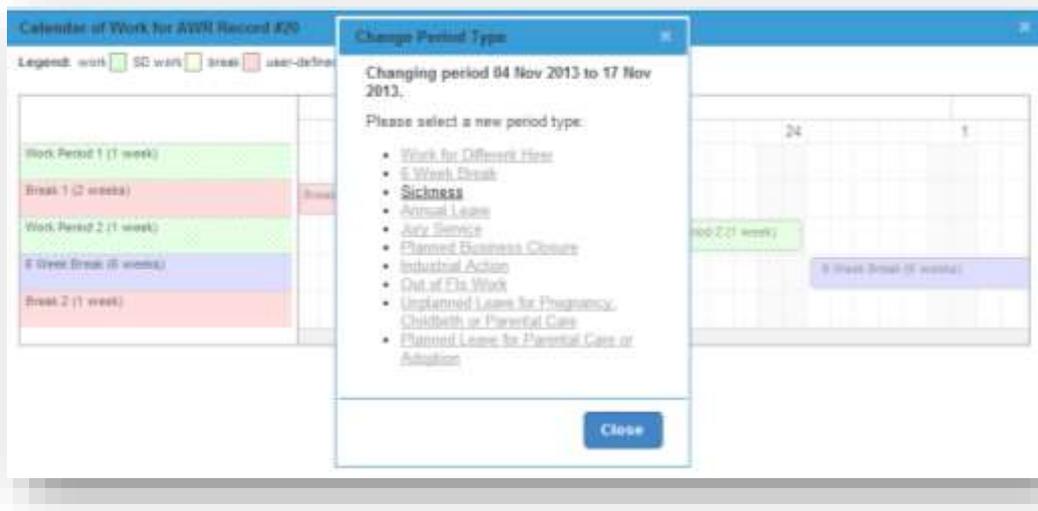
3. To view the Gantt chart for this candidate's record, click on **x Periods**.

AWR	Client	Candidate	AWR Weeks	Periods	Total Weeks	Flag	Actions
	Craig's Coffee House	Sarah Taylor	0	1 periods	10	-	 

4. To edit the type of break on the Gantt chart, click on the pink Period bar labelled **Break**.



5. Select the type of break from the list.



Resolving AWR Records

1. Find the AWR record that needs resolving and click on **Resolve**.

AWR	Client	Candidate	AWR Weeks	Periods	Total Weeks	Flag	Actions
	Craig's Coffee House	Sarah Taylor	0	4 periods	10	-	

2. Select the resolution for this candidate.



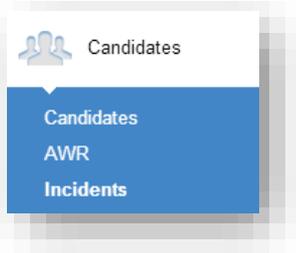
3. The AWR record changes to grey once it has been successfully resolved.

AWR	Client	Candidate	AWR Weeks	Periods	Total Weeks	Flag	Actions
	Craig's Coffee House	Sarah Taylor	0	4 periods	10	Permanent Equivalent Rates	

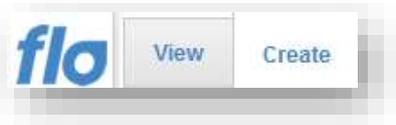
INCIDENTS

Creating an Incident

1. On the Menu, go to **Candidates** and then **Incidents**.



2. At the top of the page, click on **Create**.



3. Fill in the details of the incident from the drop down boxes. (Incident codes must be defined for each Client in the Dictionary).

A screenshot of a form titled 'CREATE NEW INCIDENT FOR CANDIDATE'. The form contains several input fields with labels and values:

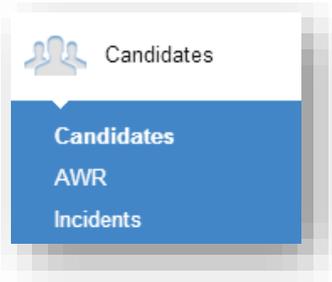
- * Candidate: John Newman
- * Client: Care Client
- * Business Unit: Care Client - Liverpool
- * Incident Code: 1
- Reference: Life

SMS TEXTING

If the SMS function is switched on in, there will be a "Send SMS" button on the following pages:

- Candidates
- Temp Plan
- Candidate Search (Temp Plan)
- Timesheets

1. On the Menu, go to **Candidates** section and click on **Candidates**..



- Use the select boxes on the left hand side to choose which candidates to send the message to and click **“Send SMS”**. To choose everyone on the page, use the Select All box at the top.

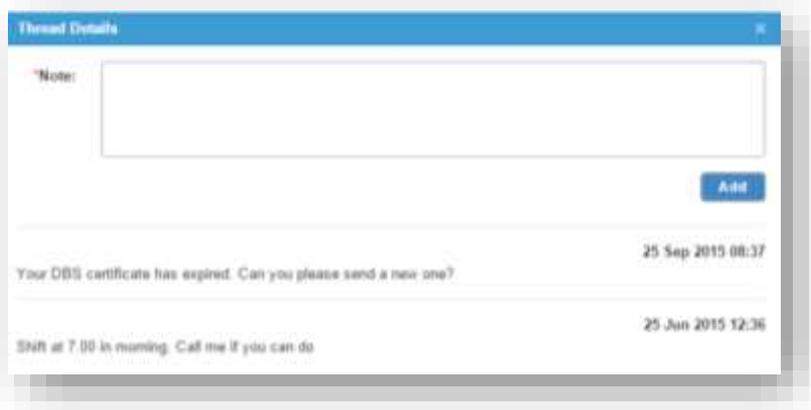
Send SMS

Name	Agency Branch	Mobile Number	E-mail	Grade	Incidents	Right to Work	Compliance Items	Availability from 25 Sep 2015							Actions
								Fri	Sat	Sun	Mon	Tue	Wed	Thu	
<input checked="" type="checkbox"/> John Aaron	Flo Demo - Liverpool Branch	07812650638	john.aaron1989@	0	1	✗	✗	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Martin Abbey	Flo Demo - Liverpool Branch	07801348257	Martinabbey77@	0	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Paul Abbott	Flo Demo - Glasgow Branch	07784244647	paul.abbott@hot	4	1	<input checked="" type="checkbox"/>	✗	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Muhammad Abdul	Flo Demo - Liverpool Branch	07784146412	m.abdul1974@p	4	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

- Type out the message to be sent to the selected candidates and click **Send**.



- This will save in the notes section on each candidate record.

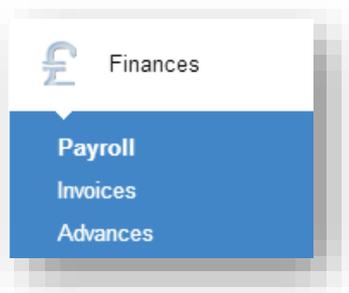


5. An email will also be sent to the Flo user's email address with confirmation of delivery to the candidates.
6. If the candidate responds, the response will be sent via email to the Flo user's email address and the "From" field will be labelled as the candidate's name.

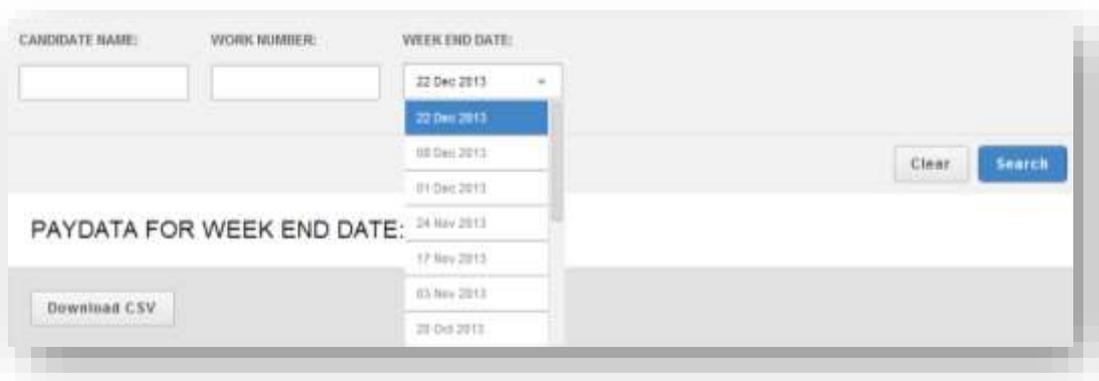
FINANCES

Payroll Data

1. On the Menu, go to Finances and Payroll.



2. Select the **Week End Date** from the drop down list and click **Search**.



3. To export data to Excel, select which rows are required and click **Download CSV**.

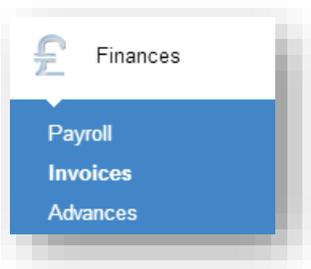
Download CSV

Candidate ID	Payable ID	Candidate Name	Work Number	Gross Pay	Expenses	Payable
3995	98	Stev Jones	337	£243.00	£3.00	No
4011	99	Paul Flynn	341	£312.00	£3.00	No

Invoices

Consolidated invoices will automatically be produced during consolidation for the hours that have been entered onto the timesheets.

1. On the Menu, go to **Finances** and **Invoices**.



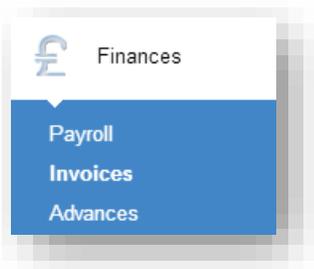
2. Use the filter boxes to find the invoice required.

The screenshot shows an 'INVOICES' dashboard. At the top, there are status counts: OPEN (658), DUE (0), and CLOSED (57). Below this are filter boxes for STATUS, WEEK END, and TOTAL AMOUNTS. There are also input fields for INVOICE NO, PURCHASE ORDER, and INVOICE TYPE. A '715 INVOICES' summary is shown with 'Clear' and 'Search' buttons. Below the filters are buttons for 'Download CSV', 'Download PDF', 'Journal Invoice', 'Close Invoice', and 'Add New Invoice'. A table of invoices is displayed with columns: Invoice No., Agency Ref., Client, Business Unit, Status, Week End Date, Raised Date, Due Date, Net, Vat, Total, Open, and Actions. The first row shows Invoice No. 718, Agency Ref. 7003, Client Team Medical, Business Unit Team Medical, Status Open, Week End Date 20 Mar 2015, Raised Date 21 Mar 2015, Due Date 04 Apr 2015, Net £1,195.01, Vat £88.45, Total £1,283.46, Open £1,236.46, and Actions buttons.

3. Use the Action buttons on the right of the row to do various tasks, including: **Download PDF**, **Export CSV Breakdown**, **Close Invoice**, **Journal Invoice** and **Manage Invoice**.

Adhoc Invoices

1. On the Menu, go to **Finances** and **Invoices**.



2. Click on **Create Adhoc Invoice**.



3. Fill in the details required and click **Create**.

Support: support@fo.co.uk
0844 322 1100

CREATE AD HOC INVOICE

Agency Reference: COL343

* Raised Date: 30 Mar 2016

* Client Name: Care Client

* Business Unit: Care Client - Liverpool Ward 1

* Invoice Type: Jan's bill

* Description: Temp to perm fee for candidate Elizabeth Boyle

Purchase Order: PO1002

* Net Amount: £ 1000

Cancel Create

4. The PDF will now be available by clicking on the PDF action button.

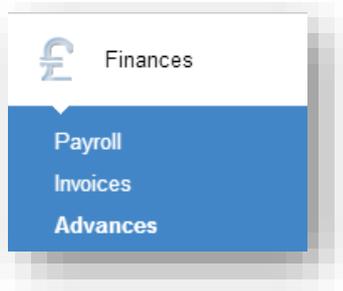
Ad hoc invoice has been added

Download CSV Download PDF Journal Invoice Close Invoice Ad Hoc Invoice

Invoice No.	Agency Ref.	Client	Business Unit	Status	Week End Date	Raised Date	Due Date	Net	Vat	Total	Open	Actions
717	COL343	Care Client	Care Client - Liverpool Ward 1	Open	03 Apr 2016	30 Mar 2016	13 Apr 2016	£1,000.00	£0.00	£1,000.00	£1,000.00	PDF

Advances

1. On the Menu, go to **Finances** and **Advances**.



2. At the top of the page, click on **Create**.



3. Start typing the name of the candidate and select from the dropdown list.



4. Type the amount of money that needs to be paid in advance to the worker and click **Add Advance**.



5. To add a Net Deduction click on the **Add Net Deduction** icon.



Candidate Name	Business Unit	Current Gross Pay	Advances Total	Last Updated	Actions
Ryan Stewart	Flo Demo Agency	0.00	2.50	2014-05-09 15:11:58	
Florence Westwood	Flo Demo - Liverpool Branch	0.00	8.75	2014-05-09 09:12:09	

6. Enter the amount the candidate has paid back in the **Sum to Deduct** field and click **Submit**.

CREATE NEW NET DEDUCTION FOR RYAN STEWART

* Sum to Deduct: 1.00

Total Balance of Advances: 2.50

Note: Paid on 01/05/2014 - Stacey

Cancel

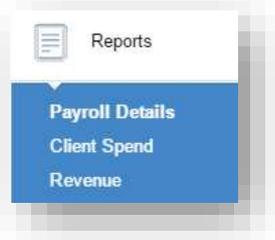
Submit

REPORTS

Payroll Details Report

The Payroll Details Report gives the details of all candidates that have been placed on a booking for the first time, without previously having produced any pay data in the system. It also monitors changes to candidates' details and adds them back onto the report so that the payroll system can be updated. This can then be uploaded into your payroll system.

1. On the Menu, go to **Reports** and **Payroll Details**.



2. Select the names of the candidates required and click **Download CSV**.

A screenshot of a web application interface. At the top left, there is a button labeled 'Download CSV'. Below it is a table with four columns: 'Candidate Name', 'Work Number', 'NI Number', and 'Mobile Number'. The table contains two rows of data, each with a checkmark in the first column.

	Candidate Name	Work Number	NI Number	Mobile Number
<input checked="" type="checkbox"/>	Toby Steele	30	NZ 00 36 25 D	07700770077
<input checked="" type="checkbox"/>	Daniel Blacks	34	PA 81 84 61 A	07440 134540

Client Spend Report

The Client Spend Report is produced each week during consolidation. This report gives details of the total spend per client for any given week.

1. On the Menu, go to **Reports** and **Client Spend**.



2. Use the filter boxes at the top to find the required week ending and click **Search**.

CLIENT NAME:

START WEEK: 16 Mar 2014

END WEEK: 16 Mar 2014

Clear Search

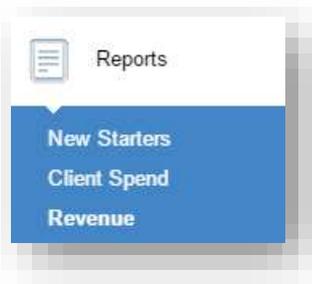
- Use the tick boxes on the left to select which clients to appear on the report and click **Download CSV**. Leaving all the tick boxes unchecked will include all visible clients in the report.

Download CSV

<input type="checkbox"/>	Client Name	VAT Type	Consultant	Net Weekly Spend	Tax Amount	Total Weekly Spend	YTD Total Spend	Week
<input type="checkbox"/>	Waste Removal	Standard	FAA	£405.00	£81.00	£486.00	£486.00	16 Mar 2014
<input type="checkbox"/>	Supermarket	Standard	Matthew Smith	£850.18	£170.04	£1,020.22	£11,860.46	16 Mar 2014
<input type="checkbox"/>	Care Client	Standard	Matthew Smith	£508,506.64	£101,701.33	£610,207.97	£622,658.58	16 Mar 2014
<input type="checkbox"/>	Logistics UK	Standard	Michael Thomason	£2,217.38	£443.48	£2,660.87	£11,719.85	16 Mar 2014
<input type="checkbox"/>	Bakery Client	Standard	David Johns	£10,000.00	£2,000.00	£12,000.00	£22,003.14	16 Mar 2014

Revenue Report

- On the Menu, go to **Reports** and **Revenue**.



- Use the filter boxes at the top to find the Client, Agency Branch and Weekending date required and click **Search**.

AGENCY BRANCH: All

CLIENT: All

WEEK ENDING DATE: 1 Feb 2015

Clear Search

- To export the information, click on the **Download CSV** button.

Download CSV

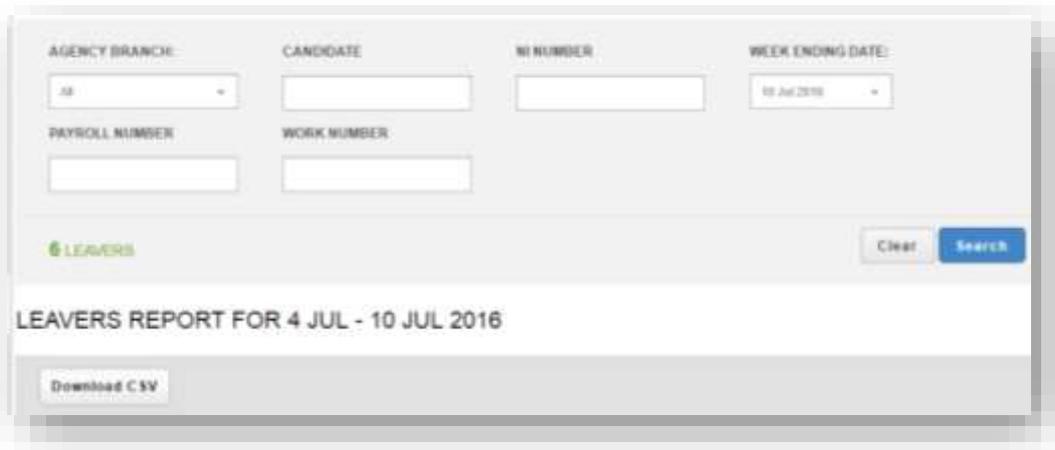
Leavers Report

The Leavers Report shows candidates who have been deactivated each week.

1. On the Menu, go to **Reports** and **Leavers**.



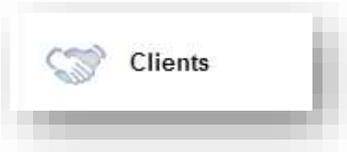
2. Click on **Download CSV** to export the data to Excel.

A screenshot of a web application interface for generating a Leavers Report. At the top, there are four search criteria: 'AGENCY BRANCH' (with a dropdown menu showing 'All'), 'CANDIDATE' (with an empty text input), 'NI NUMBER' (with an empty text input), and 'WEEK ENDING DATE' (with a dropdown menu showing '10 Jul 2016'). Below these are two more criteria: 'PAYROLL NUMBER' and 'WORK NUMBER', both with empty text inputs. To the right of the search criteria are two buttons: 'Clear' and 'Search'. Below the search area, there is a green icon and the text 'LEAVERS'. Underneath, the report title 'LEAVERS REPORT FOR 4 JUL - 10 JUL 2016' is displayed. At the bottom left of the report area, there is a 'Download CSV' button.

CLIENTS

Creating a New Client

1. On the Menu, go to **Clients**.



2. At the top of the page, click on **Create**.



3. Enter the details for the new Client including all mandatory fields (marked with *). The VAT number is required to Activate the Client.

A screenshot of a form titled 'CREATE A NEW CLIENT'. The form contains several input fields: 'Agency Branch' (a dropdown menu with 'Please select value'), 'Client Name', 'No. Business Units', 'Website', and 'Address'. The 'Agency Branch' and 'Client Name' fields are marked with an asterisk (*).

4. Once all the details have been saved, click **Create**.



5. To activate the Client, click on **Activate**.

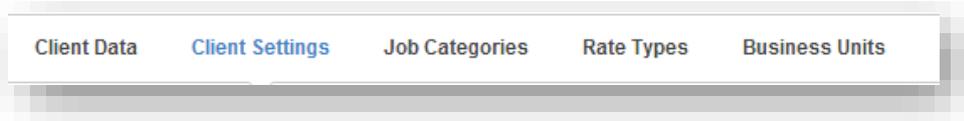
Name	Assigned To	No. BU	No. JC	No. Users	VAT Number	Rank	Status	Actions
<input type="checkbox"/> Care Client		1	0	0	85496842	Unknown	prospect	 

Edit Client Settings

1. To edit the Client details including Rates, Business Units and Job Categories click on the **Client Name**.

Name	Assigned To	No. BU	No. JC	No. Users	VAT Number	Rank	Status	Actions
<input type="checkbox"/> Cars Client		1	0	0	65496842	Unknown	active	

2. Click on **Client Settings** at the top of the page.



3. To set the default AWR resolution for this Client, select the required option from the drop down box. Setting this option will automatically resolve a candidate's AWR record once they reach the end of the qualifying period. If there is no default resolution for this Client, set as **No Current Action**.

AWR Allowable Resolution:

AWR Default Resolution: Swedish Derogation ▼

- No Current Action
- Permanent Equivalent Rate**
- Swedish Derogation
- End of Assignment
- No Comparator

4. Select all resolutions that are applicable to this Client. All resolutions will be available for Agency Users, but only the selected resolutions will be available for Client Users.

AWR Default Resolution: Permanent Equivalent Rate ▼

- Permanent Equivalent Rate
- Swedish Derogation
- End of Assignment
- No Comparator
- Regulation 3.2 Limited Company
- Ignore Warnings

5. Set when a Candidate's AWR record changes from green to orange for a Client user, to display a warning that the end of the qualifying period is approaching. The **Warning Limit** is the number of AWR weeks worked.



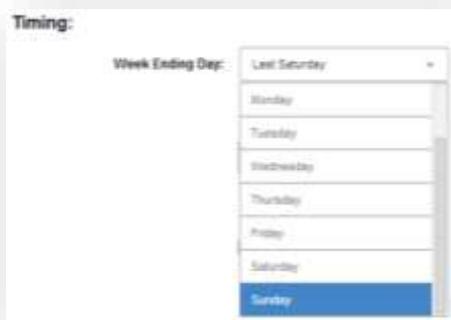
Warning Limit:

6. To record incidents in Flo for this Client, check the box called **Company Uses Incidents**. Set the maximum number of incidents per candidate in the **Limit** field. Once a candidate has exceeded this limit, they will not be able to be booked again for this Client.



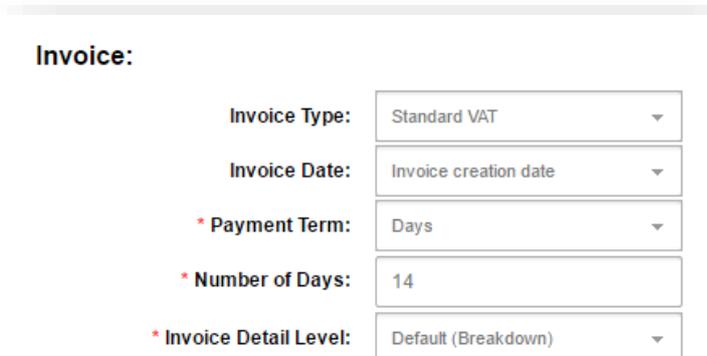
Incidents:
Enforce Incidents Points Limit:
* Limit:

7. Select the Client's weekending day (by default this is set to Sunday). This will be the last day that appears on the timesheet, i.e. Monday-Sunday. To set the timesheets to work a week in arrears, select Last Saturday/Last Sunday.



Timing:
Week Ending Day:
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday

8. Change the invoice settings for this client by using the options in the dropdowns.



Invoice:
Invoice Type:
Invoice Date:
* Payment Term:
* Number of Days:
* Invoice Detail Level:

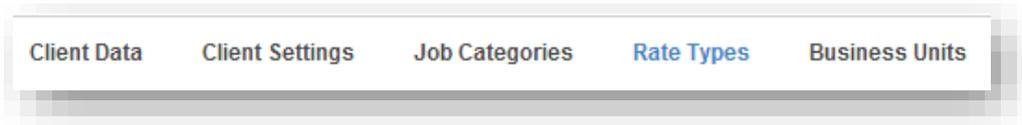
- a. Select whether the invoices for this Client include VAT by clicking on Standard (20% VAT), Reduced (5% VAT) or Zero (0% VAT).
- b. Change the Invoice Date by selecting Invoice Creation Date (the date of consolidation), Client weekending date (the last date of the timesheet), or system weekending date (the Sunday before consolidation)
- c. Payment terms can either be a number of days or a custom message
- d. Detail level can either be Default (set in Agency Settings), Breakdown or Summary

9. Once all the Client Settings have been entered, click **Save**.

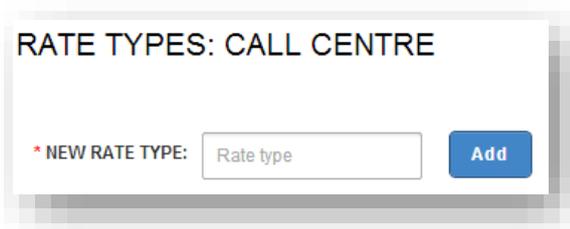


Edit Rate Types

1. Click on **Rate Types** at the top of the page.



2. Type the new Rate Type in the box and click **Add**. The default Rate Types already set up are STD, OT, SAT, SUN and BH. These are not job specific and will be used for all jobs for this Client.



3. To edit a Rate Type, double click on the word, type the correction and press Enter.



Edit Job Categories

1. To add new Job Categories to this Client, click on **Job Categories** at the top of the page.

2. Click **Add** on the right of the page.



3. Type the **Name** of the Job Category and select whether this is a VAT Exempt role.

* Name:

VAT Exempted:

4. If the job category is for a night shift, check the box to enable Night Shift warnings.

* Name:

VAT Exempted:

Night Shift:

5. Enter the **Shift Name**, enter a total for the **Warning** and **Limit** of hours per day (if required).

* Shift Name:	Warning	Limit
<input type="text" value="Standard"/>	<input type="text" value="8.00"/>	<input type="text" value="10.00"/>

Define Standard Hours

6. To **Define Standard Hours** for this Job, tick the checkbox and fill in the hours in each day.

* Shifts:	* Shift Name:	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Warning	Limit
	<input type="text" value="Standard"/>	<input type="text" value="7.50"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="8.00"/>	<input type="text" value="10.00"/>				

Define Standard Hours

- To enter multiple shifts for a job (e.g. if a job extends across Day and Night with different rates), click **Add Another Shift** and enter the new shift details.

*** Shifts:**

* Shift Name:	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Warning	Limit
Day	7.50	7.50	7.50	7.50	7.50	0.00	0.00	8.00	10.00
Night	7.50	7.50	7.50	7.50	7.50	0.00	0.00	8.00	10.00

Define Standard Hours

Add Another Shift

7. To enter the default rates for this job category, click on **Add**.

Default Rates

Employment Cost: numerically %

Shift	Rate type	Rules for allocation of hours	Pay Rate	NI	WTR	Pension	Addit.	Work Cost	Agency Margin	Client Charge
Add										

8. The rates can be entered into the boxes in 2 ways:

a) By typing manually into each box*:

Default Rates

Employment Cost: numerically %

Shift	Rate type	Rules for allocation of hours	Pay Rate	NI	WTR	Pension	Addit.	Work Cost	Agency Margin	Client Charge
Standa	STD	Under 7.50 Per day, Mon	8.50	0.35	0.83	0.00	0.00	7.88	2.00	0.88
Standa	OT	Above 7.50 Per day, Mon	7.50	0.48	0.00	0.00	0.00	7.88	2.00	0.88

Add

*The NI and WTR boxes provide an hourly average of these figures if required. These are not the actual figures that are calculated at payroll.

b) By entering the pay rate and calculating a percentage:

Default Rates

Employment Cost: numerically %

Shift	Rate type	Rules for allocation of hours	Pay Rate	%	Work Cost	Agency Margin	Client Charge
Standa	STD	Under 7.50 Per day, Mon	8.50	10.00	7.15	2.53	0.88
Standa	OT	Above 7.50 Per day, Mon	7.50	10.00	8.25	1.73	0.88

Add

9. Enter the Job Titles from the Dictionary which are required for this role*. These can then be searched for from the candidate database.

Required Jobs

Jobs: customer{

Required Skills

Skills: customer (add to dictionary)
 Customer Service
Customer Service Clerk (In: Customer Service)
 Advisor (In: Customer Service)

*If you have permission to edit the Job Titles dictionary, you can add new Job Titles from this page by typing into the box and saving the entry. This will also add the Job Title to the Dictionary.

10. If there are any Compliance Items required for this job, select from the drop down list (bespoke Compliance Items can be defined in Settings – Page 65).

Requirements: Select a type:

Req: DBS Check
 DHL Induction
 Driving License
 Expenses
 Food Hygiene
 Fork-lift Licence
 Health & Safety

11. Fill in the title of the document and click **Add**.

Requirements: CSCS * Title: **Add**

12. Click **Save**.

Save

Edit Client Business Units

1. Click on Business Units at the top of the page.

2. Click on **Add Business Unit**.

▼ Call Centre
Add Business Unit View

3. Fill in the details for the new Business Unit including all mandatory fields (marked with *). Ensure you add the business unit postcode to use the distance to work functionality in candidate search.

CREATE A NEW BUSINESS UNIT

* Business Unit Name:

No. Business Units:

Website:

* Address:

4. Choose the Bank Holiday region for this Business Unit.

Bank Holiday Region:

- England & Wales
- Scotland
- Northern Ireland
- Isle of Man

5. Once all the details have been filled in, click **Create**.

Create

Add Contacts

1. To add contacts to a Client click on the **Client Name**.

	Name	Assigned To	No. BU	No. JC	No. Users	VAT Number	Rank	Status	Actions
<input type="checkbox"/>	Call Centre		1	0	0	107 2460 54	Unknown	active	 

2. Scroll down to the Contact widget and click on **Add New Contact**.

CONTACTS

Add New Contact

Name	Business Unit	Job Title	Phone	Mobile	Email	Actions
No contacts were added yet.						

3. Fill out the details for the Client contact and click **Save**.

Contact

* First Name:

* Last Name:

Business Unit:

Job Title:

Phone:

Mobile:

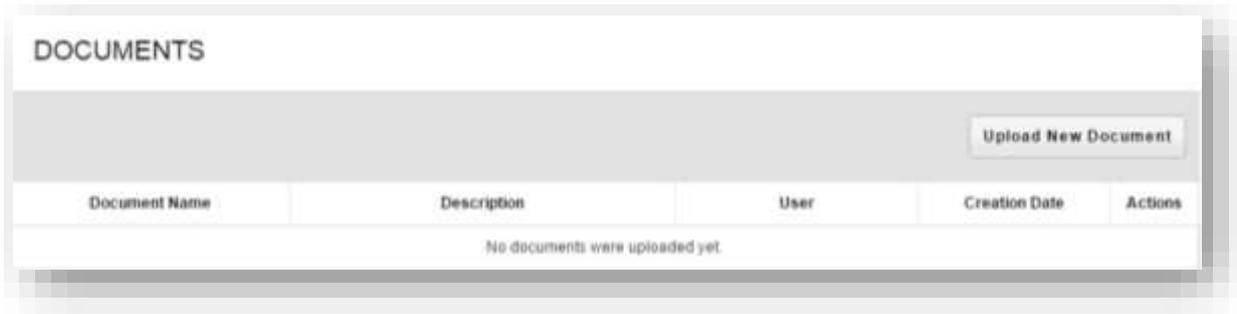
Email:

Add Documents

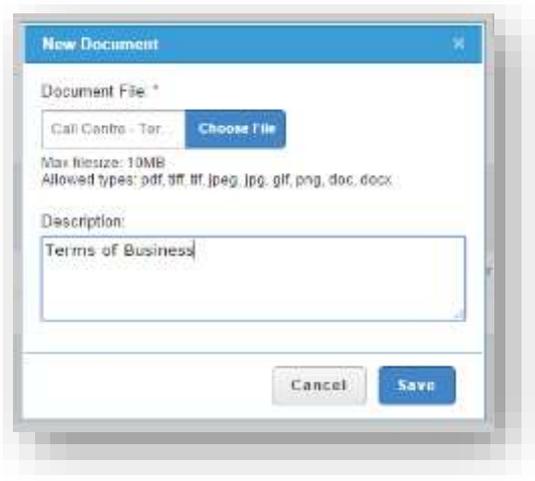
1. To add documents to a Client click on the **Client Name**.

	Name	Assigned To	No. BU	No. JC	No. Users	VAT Number	Rank	Status	Actions
<input type="checkbox"/>	Call Centre		1	0	0	107 2460 54	Unknown	active	 

2. Scroll down to the Document widget and click on **Upload New Document**.



3. Select the file to be uploaded, add a note if required and click **Save**.

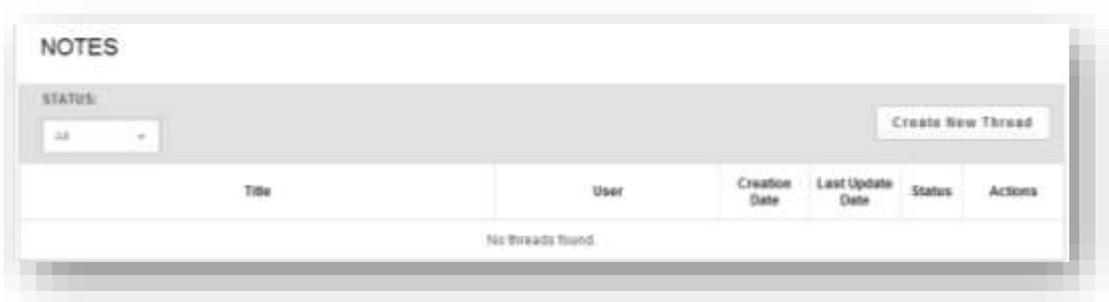


Create Client Notes

1. To add a note to the Client click on the **Client Name**.

	Name	Assigned To	No. BU	No. JC	No. Users	VAT Number	Rank	Status	Actions
<input type="checkbox"/>	Call Centre		1	0	0	107 2460 54	Unknown	active	

2. Scroll to the bottom of the page and click on **Create New Thread**.



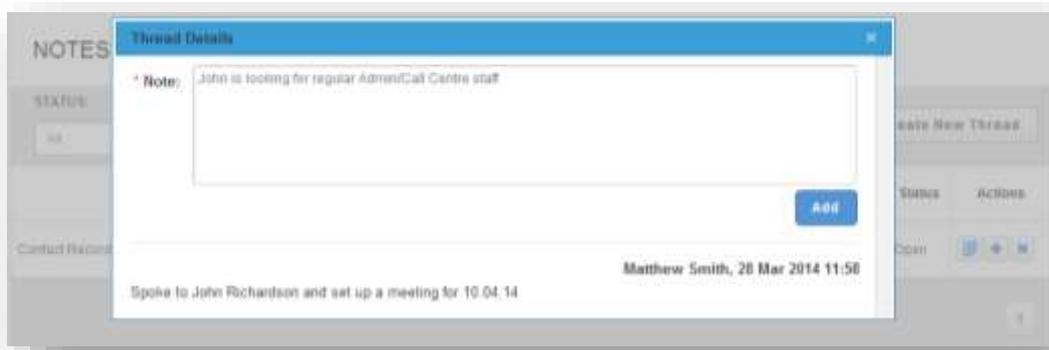
3. Enter the **Title** of the thread, add the first **Note** and click **Create**.



4. To add a new note to an existing thread, click on **View**.



5. Type the details of the new note and click **Add**.



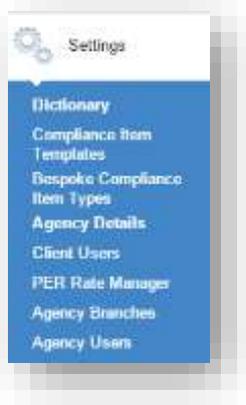
6. If there are multiple Notes Threads, it is possible to make a thread “Sticky” which means that it will always be on top.



SETTINGS

Dictionary

1. On the Menu, go to **Settings** and **Dictionary**.



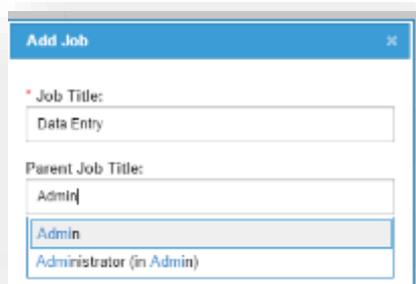
2. At the top of the page, click on **Jobs**.



3. To add a new job title to the dictionary, click on **Add Job**.



4. Type the name of the job into the **Job Title** box and start typing the name of the parent group of jobs (if required).

A screenshot of a form titled 'Add Job'. It has two input fields. The first is labeled '* Job Title:' and contains the text 'Data Entry'. The second is labeled 'Parent Job Title:' and contains the text 'Admin'. Below the second field, there is a dropdown menu with two options: 'Admin' (which is selected and highlighted) and 'Administrator (in Admin)'.

Agency Details

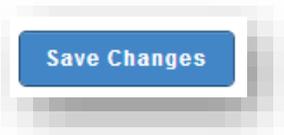
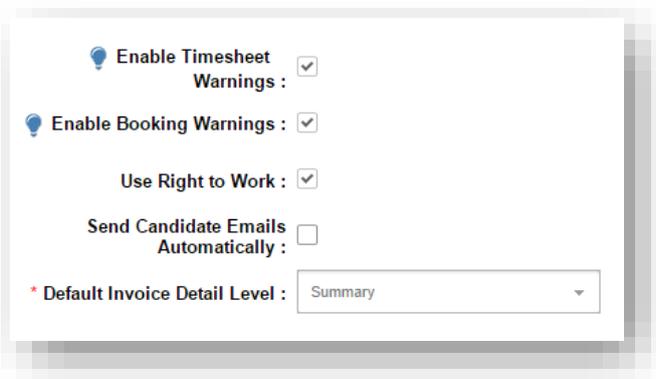
1. On the Menu, go to **Settings** and **Agency Details**.



2. At the top of the page, click **Agency Settings**.

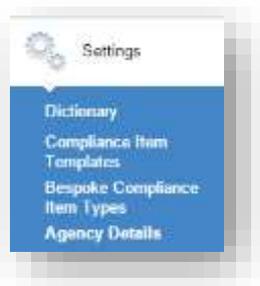


3. Edit the settings on the page and click **Save Changes**.

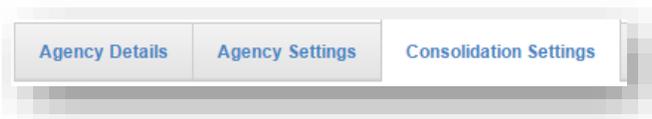


Change Consolidation

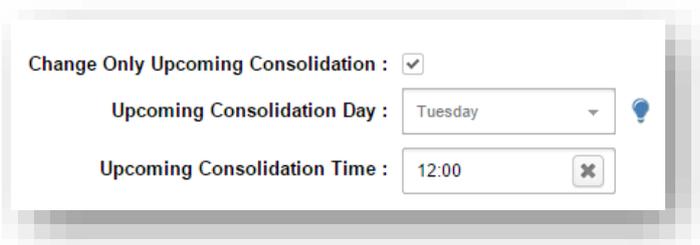
1. On the Menu, go to **Settings** and **Agency Details**.



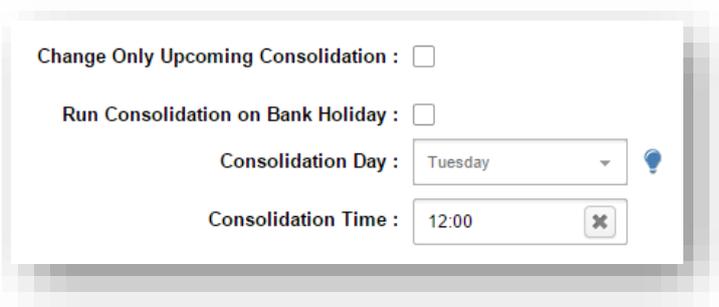
2. At the top of the page, click **Consolidation Settings**.



- a. To change the settings for the next consolidation only, tick the box labelled “**Change only upcoming consolidation**” and select the desired day/time and click **Save**.



- b. To change the settings permanently, update the day and time and click **Save**.

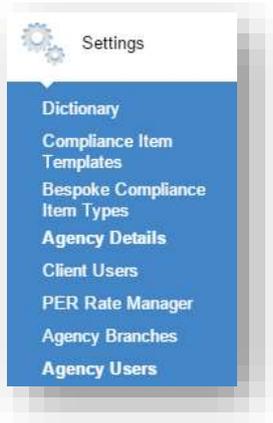


Please note, you will not be able to change your consolidation time if there is less than 5 minutes until your consolidation will run. It is also not possible to select midnight as a time.

Agency Users

You will only be able to edit the Branch access and User Roles for other users, you will not be able to edit your own permissions.

1. On the Menu, go to **Settings** and then **Agency Users**.



2. At the top of the page, click on **Create**.



3. Enter the details on the form, including all the mandatory fields (marked with *). The email address will become the username, and this field is case sensitive.

4. Select the Permissions Type and click **Save**.

There are two options for the Permissions Type:

- **All Data:** the user will have access to all business units, including any new business units that get added at a later date.

- **Adopted Data:** the user will only have access to selected business units from the list. Any new business units that get added at a later date will need ticking separately.

5. In the User view screen, find the user in the list and click on the **User Roles** icon on the right of the row.

Matthew Smith	matthew.smith@flo.co.uk	07984 103203	All Data	Pending	
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6. There are 2 possible ways to add User Roles to a user.
 - a) Select a User Role from the drop down list and click **Add**. Repeat this until user has all required roles. (This is how the first user that is set up is to be added, you cannot do option 'b' for the first user entered.)

- b) Alternatively, it is possible to clone the roles from another user. In the Clone Roles from User box, type the name of the user whose roles you wish to use and click **Clone**.

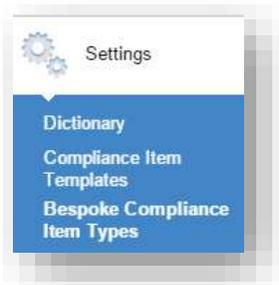


7. Activate the user by clicking the **Activate** button on the right of the row. This will send an email to the user containing their log in details.

Matthew Smith	matthew.smith@flo.co.uk	07984 103203	All Data	Pending	
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Bespoke Compliance Items

1. On the Menu, go to **Settings** and **Bespoke Compliance Items**.



2. At the top of the page, click **Create**.



3. Type the **Name** of the Compliance Item and add a **Description** (if required).

4. To upload documents for this Compliance Item, check the **Enable Files Upload** box.

Enable Files Upload

5. Click **Save**.

Save

PER Rate Manager

1. On the Menu, go to **Settings** and **PER Rate Manager**.



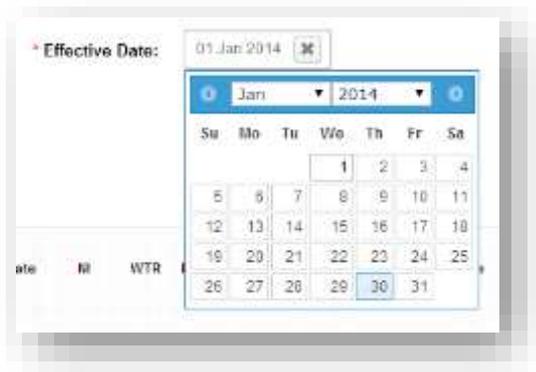
2. At the top of the page, click on **Create**.

flo View Create

3. Start typing the Name of the **Client**, the **Business Unit** and the **Job Category** and select from the drop down list.

A screenshot of a web form titled 'CREATE PER RATES'. The form contains three dropdown menus, each with an asterisk and a label: '* Client:' with 'Call Centre' selected, '* Business Unit' with 'Call Centre - Manchest' selected, and '* Job Category' with 'Customer Services (#1)' selected.

4. Select the **Effective Date**.



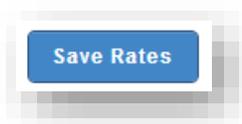
5. To add a shift, click **Add**.



6. Enter the rate details for the PERs and click **Add** for each new shift.



7. Click **Save Rates**.

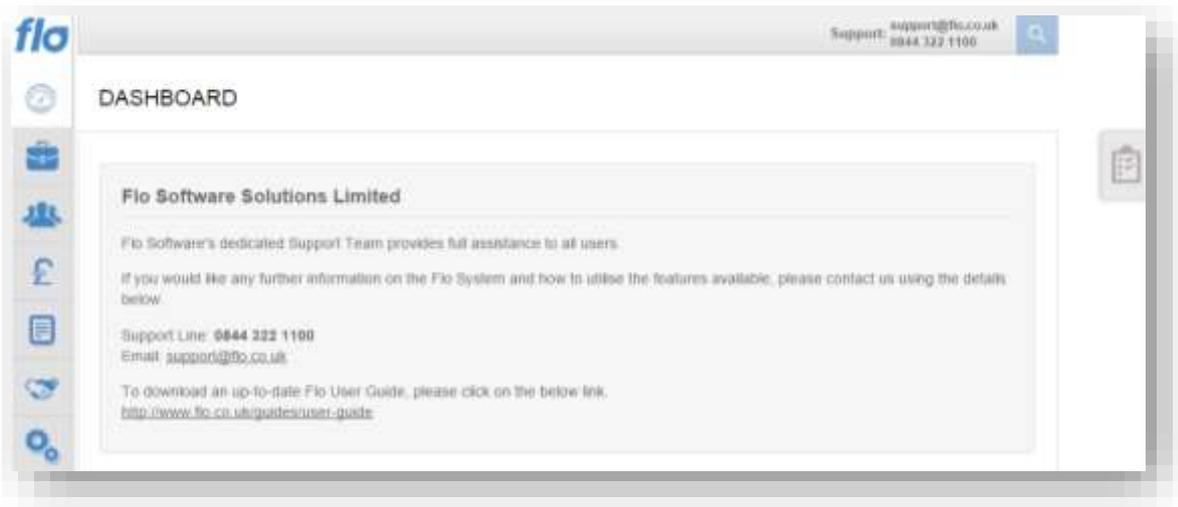


TASKS

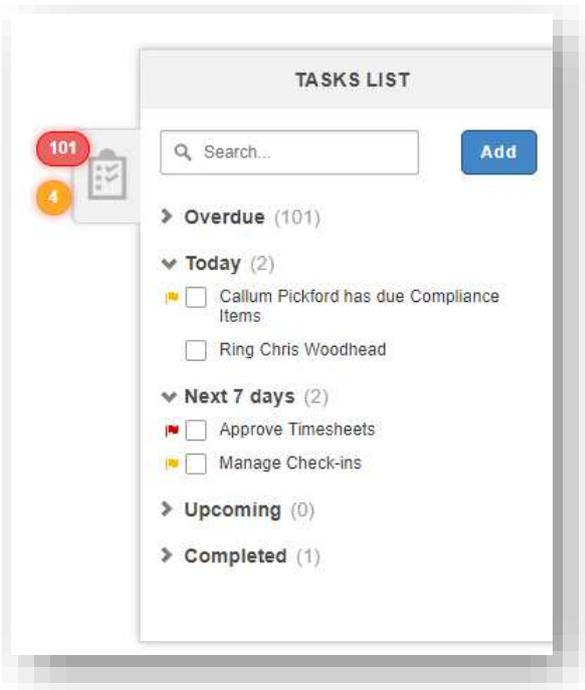
Each user has access to their own Task list within Flo. The Task list is available on the right hand side of the screen, no matter which part of the system is open.

Manually Adding Tasks

1. To add a Task, open the Task bar by clicking on the icon.



2. Click on **Add**.



3. Fill out the Title, set the Due Date and the Priority and click Save.

Add New Task

Title: Ring Peter back

Due Date: [] Due Time: []

Priority: [Low] [Medium] [High]

Add New Note: Set high priority

Cancel Save

4. The Task will drop into the appropriate section on the Task List.

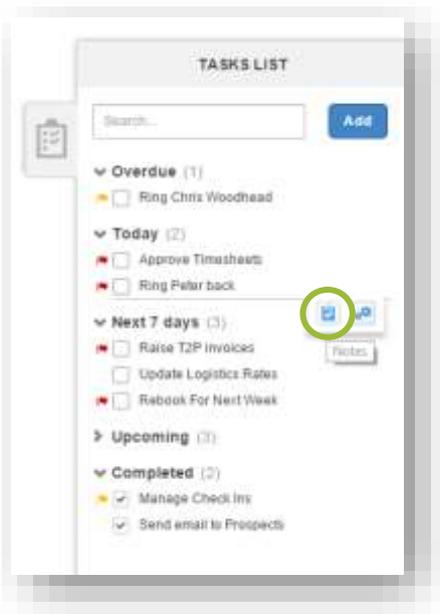
TASKS LIST

Task has been added. X

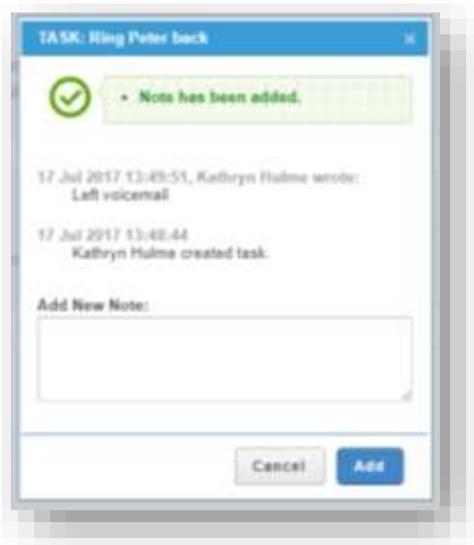
101 5

- > Overdue (101)
- ▼ Today (3)
 - ☑ Callum Pickford has due Compliance Items
 - ☑ Ring Peter back
 - ☑ Ring Chris Woodhead
- ▼ Next 7 days (2)
 - ☑ Manage Check-ins
 - ☑ Approve Timesheets
- > Upcoming (0)
- > Completed (1)

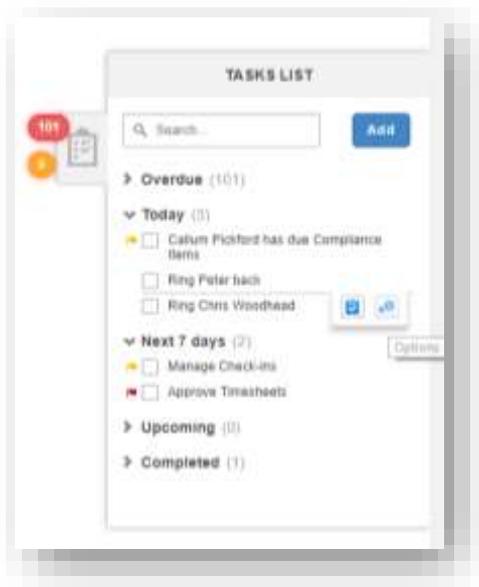
5. To add a Note to the Task, click on **Notes**.



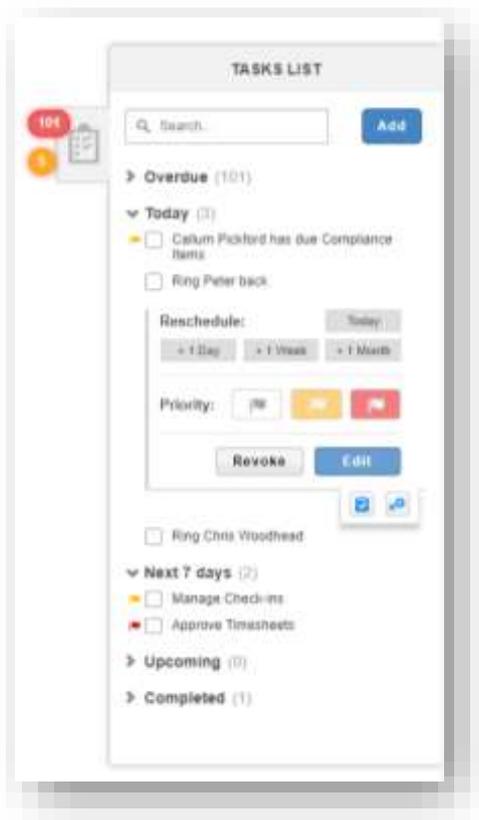
6. Type out the Note and click **Add**.



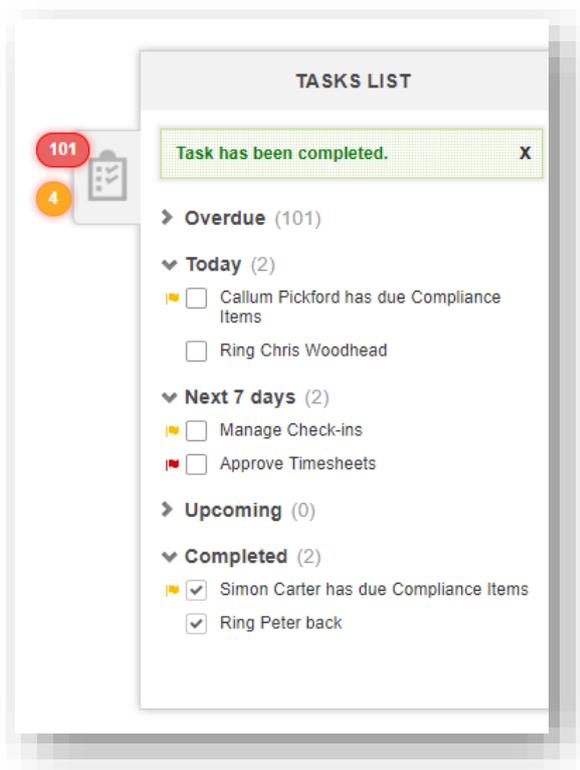
7. To edit the Task, click on **Options**.



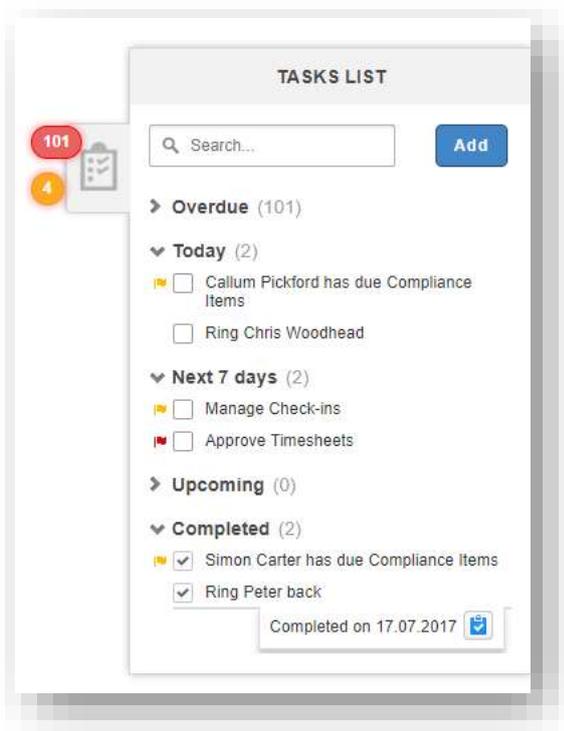
8. Use the options to edit the Task.



9. To mark the Task as complete, tick the box.



10. This will then move into the Completed section.



Auto-Generated Tasks

The system will create Tasks in the system to notify users when com

GLOSSARY

Term	Definition
Hours Limit	Set a limit on the number of hours entered per day in the timesheets.
Hours Warning	Set a warning that displays if a high number of hours are entered onto a day in the timesheet.
PER	Permanent Equivalent Rate; Referring to AWR Regulations, these rates are defined for when the temporary worker has reached their AWR limit in their current role, PER are the rates they will be working at.
Set Standard Week	If the hours worked for a particular job are the same each week, setting the standard hours gives the option to automatically fill these hours on the timesheets.

Rules	Descriptions
Per day, Mon-Fri	Total number of hours per day, on the days between Monday and Friday
Fri	Total number of hours on Friday
Sat	Total number of hours on Saturday
Sun	Total number of hours on Sunday
Weekend	Total number of hours on Saturday & Sunday
Bank Holiday	Total number of hours on a Bank Holiday
Per Day, Mon-Thu	Total number of hours per day, on the days between Monday and Thursday
Per Day, Mon-Sat	Total number of hours per day, on the days between Monday and Saturday
Per Day, Mon-Sun	Total number of hours per day, on the days between Monday and Sunday
Per Day, Sun-Thu	Total number of hours per day, on the days between Sunday and Thursday
Per Week, Mon-Thu	Total number of hours per week, on the days between Monday and Thursday
Per Week, Mon-Fri	Total number of hours per week, on the days between Monday and Friday
Per Week, Mon-Sat	Total number of hours per week, on the days between Monday and Saturday
Per Week, Mon-Sun	Total number of hours per week, on the days between Monday and Sunday
Per Week, Sun-Thu	Total number of hours per week, on the days between Sunday and Thursday