make your business flo

Flo Software Solutions

User Guide

V6.7

ICONS KEY

	Details
	Save
	View
	Edit
	Show Details
	Hide Details
	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
email: support@flo.co.uk
Web: www.flo.co.uk

LOG IN DETAILS

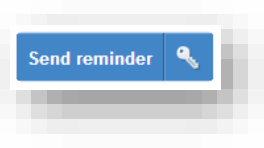
Setting Password

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.

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**.

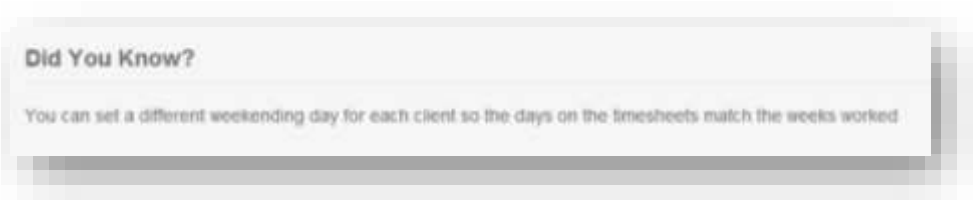


3. Once the email is received, enter the one-time password and set new password ensuring that the new password contains at least 8 characters with 1 letter and 1 number.

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.

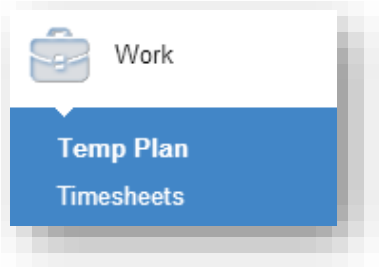
The Dashboard also contains a **Did You Know?** section with hints and tips on using the Flo system.



WORK

Creating a New Booking

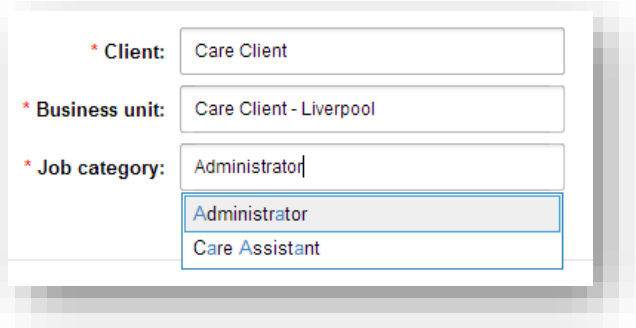
1. On the menu, click on **Work** and then **Temp Plan**.



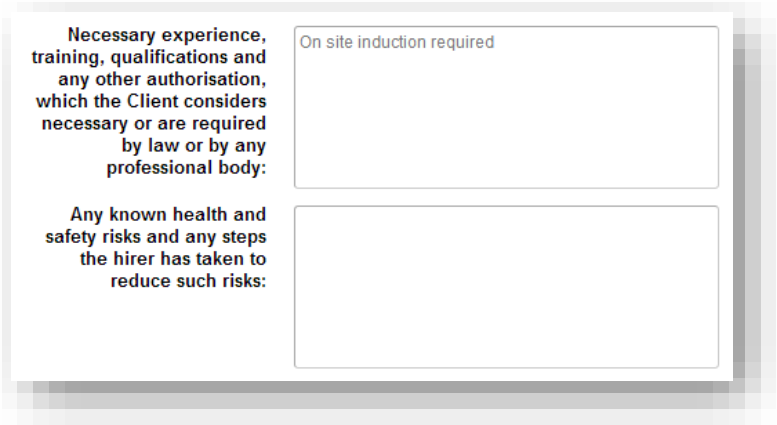
2. At the top of the page, click **Create**.

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.

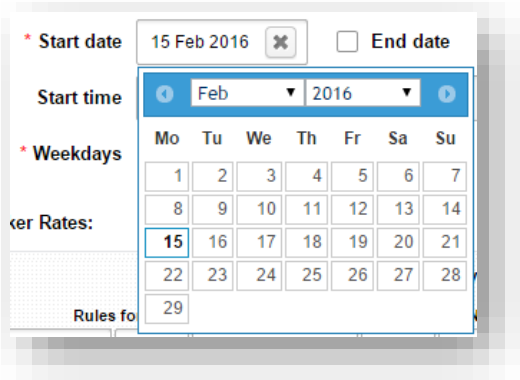
4. Select the job category from the pre-set list (job categories are set in the Client section – Page 52).



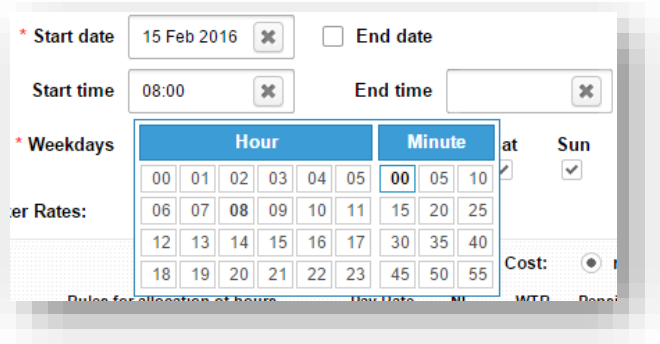
5. Use the boxes to enter any specific details about the booking, for example if there is any necessary experience required or health and safety risks.



6. 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.



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



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

9. 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:

a) By typing manually into each box*:

*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:

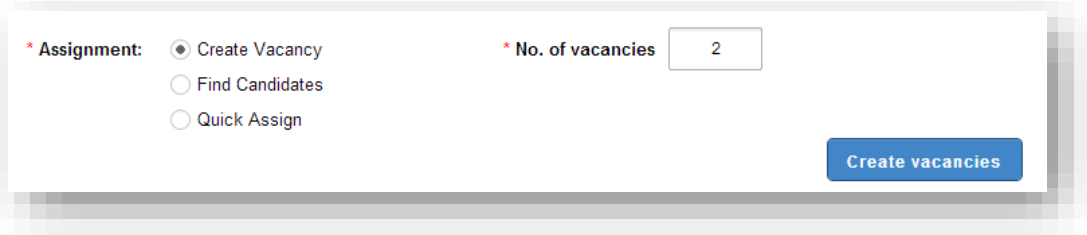
c) If Permanent Equivalent Rates (PERs) have been set up for this job, they will be visible under the temporary worker rates (PERs are edited in Settings – Page 66).

PER Rates:

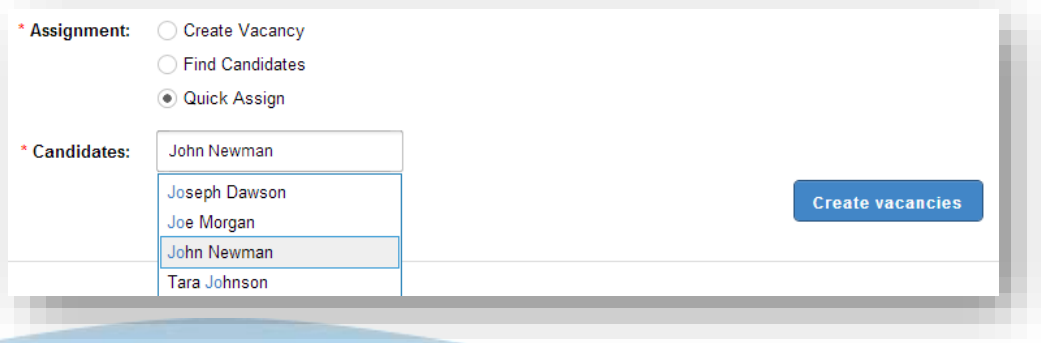
Shift	Rate type		Rules for allocation of hours		Pay Rate	NI	WTR	Pension	Addit.	Work Cost	Agency Margin	Client Charge
Standard	STD	Under	7.50	Per day, Mon-Sun	8.00	0.56	1.03	0.00	0.00	9.59	1.00	10.59
Standard	OT	Above	7.50	Per day, Mon-Sun	8.50	0.63	1.19	0.00	0.00	10.32	1.00	11.32

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.

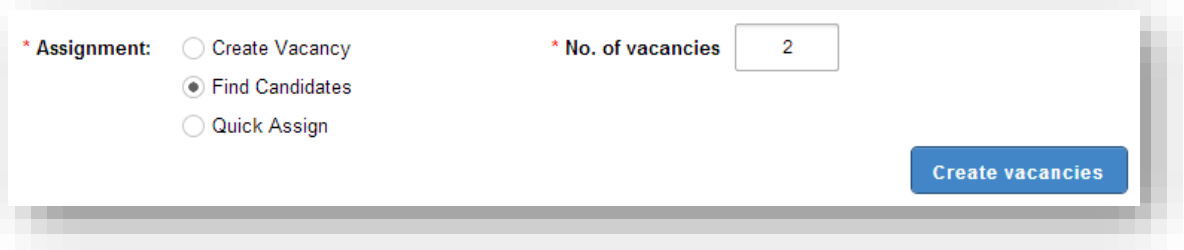
a) To create a vacancy or multiple vacancies without immediately assigning a candidate, click on **Create Vacancy**, type the **No. of vacancies** in the box and click **Create Vacancies**.



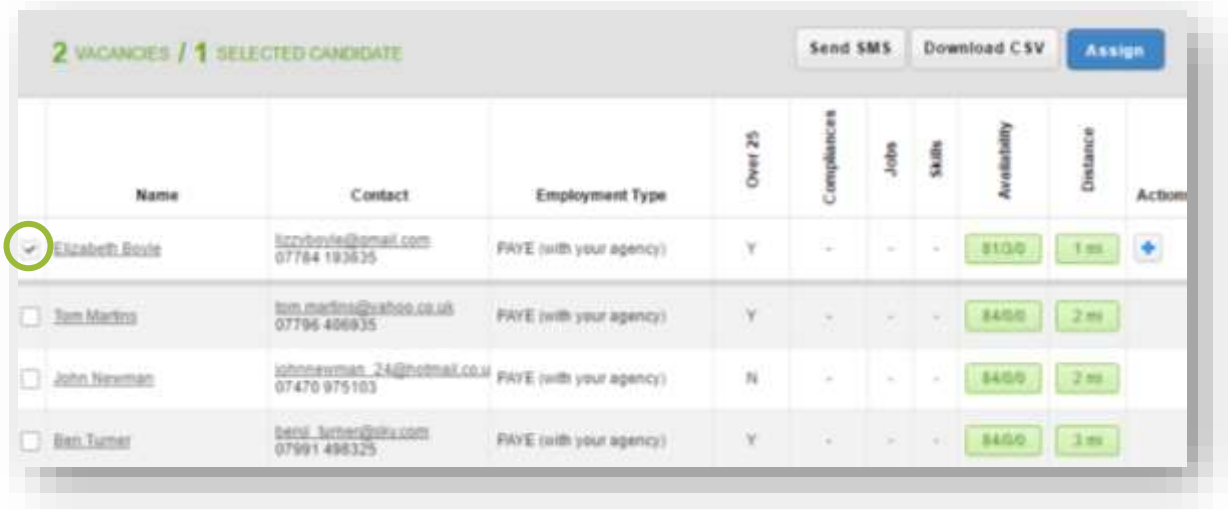
b) If there is a particular candidate to be placed on this booking, click **Quick Assign**, start typing their name in the **Candidate** box, select their name from the drop down list and click **Assign Candidate**.



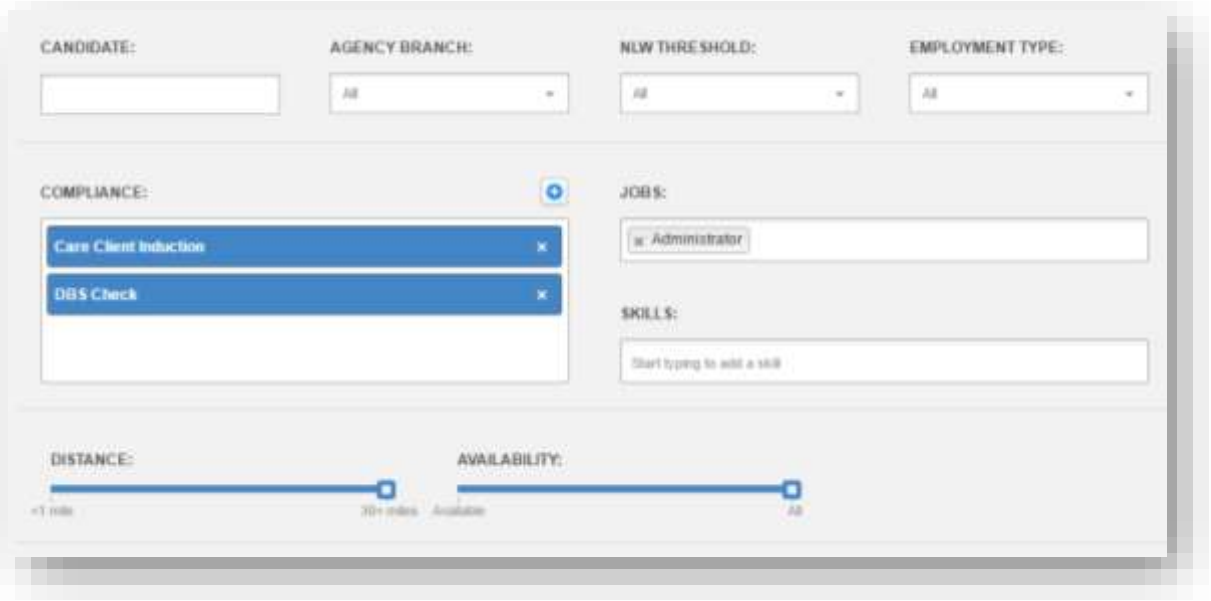
c) Alternatively, to select multiple candidates for this booking or find suitable candidates based on search criteria, click **Find Candidates**, type the **No. of Vacancies** required and click **Create Vacancies.**



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.

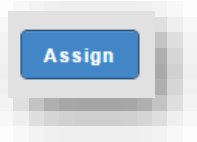


12. To change the filter options, edit the search criteria in the relevant boxes and click **Search**. By default, the system will search against the criteria set up in the Client settings.



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.

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



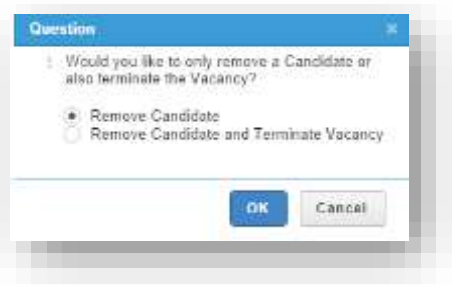
15. Once a candidate has been assigned to a vacancy, they will show on the Temp Plan in amber (pending confirmation). A timesheet will only be created once a candidate has been accepted.

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

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

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

- 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).

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

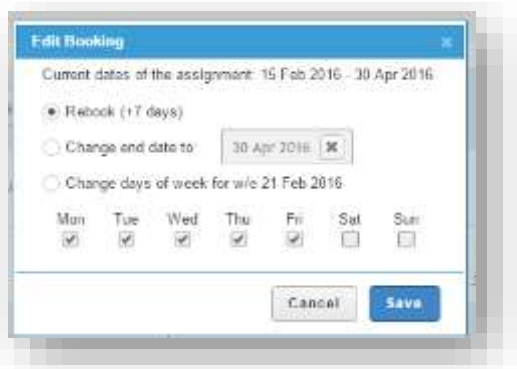
The vacancy will turn black, but will disappear once the page has been refreshed.

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

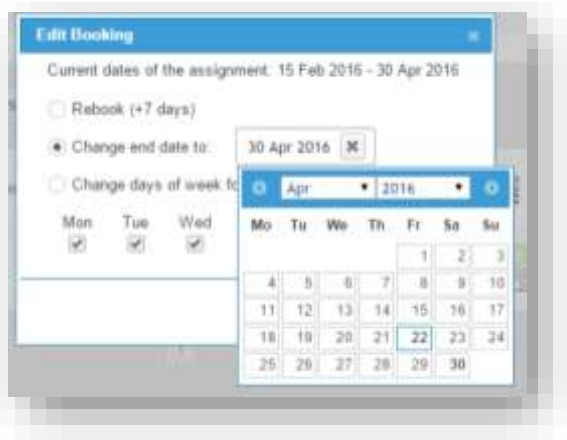
Editing a Booking

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

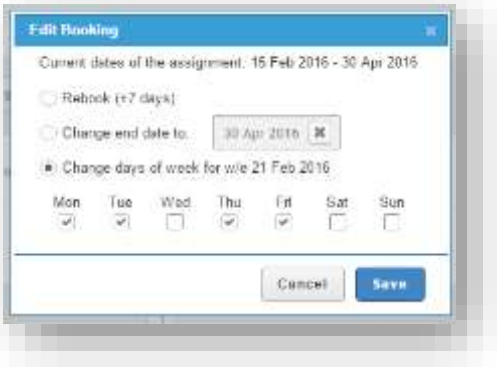
2. This will give you two options for editing the end date: a) Rebook (+ 7 days) b) Change end date
   a) Rebook (+ 7 days)



   b) Change end date



   c) Change days of week for current week



Cloning a Booking

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

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

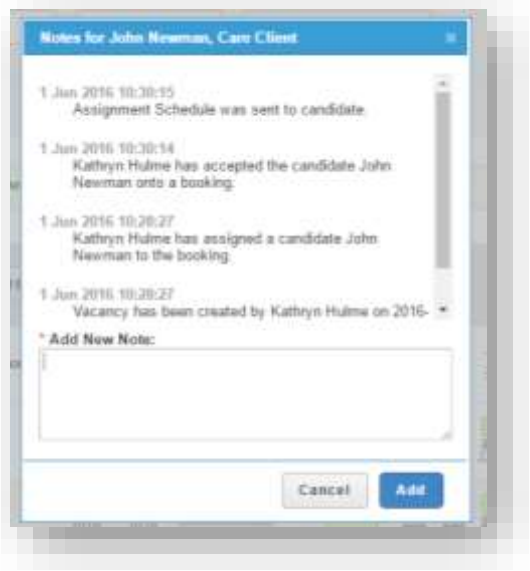
3. New Vacancies will appear unfilled on the Temp Plan.

Notes on Bookings

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

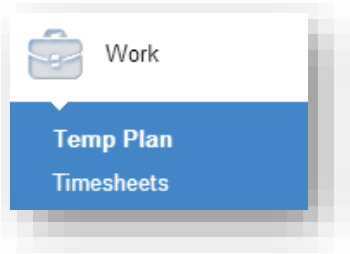
1. To view the actions on the Bookings, click on the **Notes** button.

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



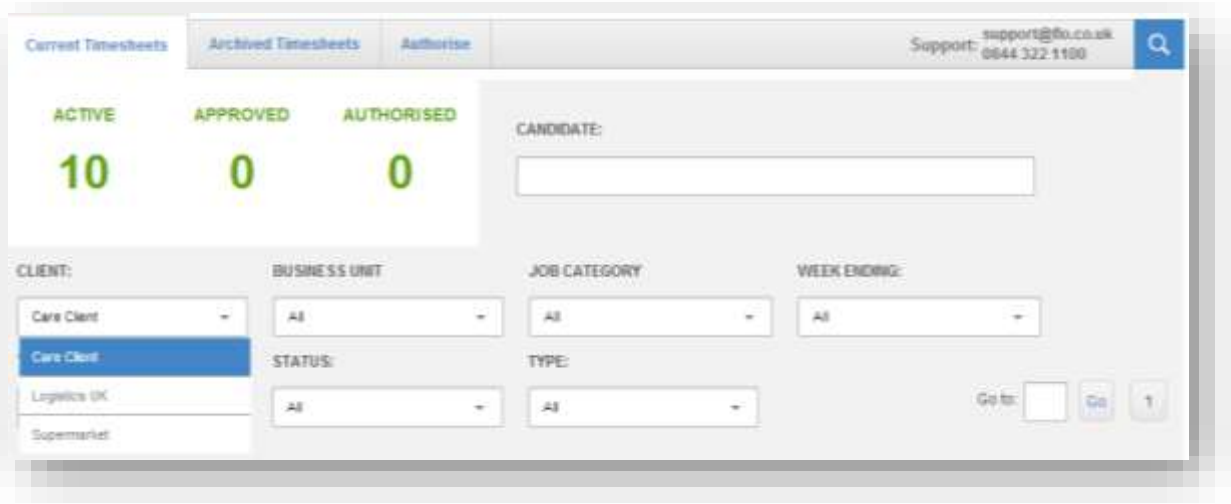
Editing a Timesheet

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



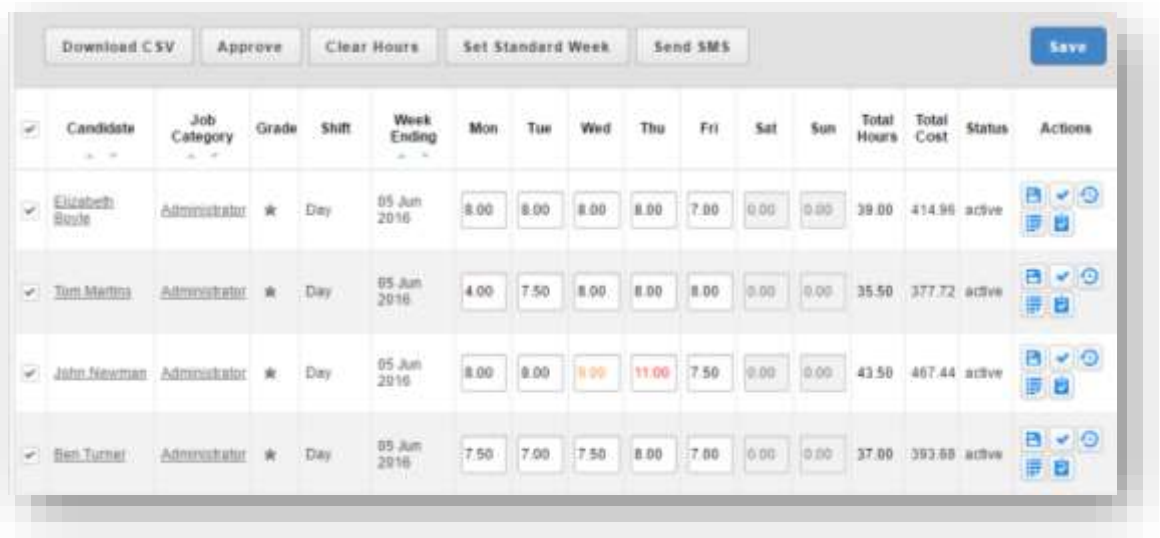
- The **Current Timesheets** tab will show all the timesheets that have not transacted yet, including all timesheets for the current week plus any historic timesheets that have only just been added
- The **Archived Timesheets** tab will show all timesheets that have ever transacted from the first week's consolidation.

2. On the Current Timesheets tab, select the Client name, use the filter boxes to find the specific timesheet and click **Search**.



3. 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.



- 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.

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

- 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.

- 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.

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

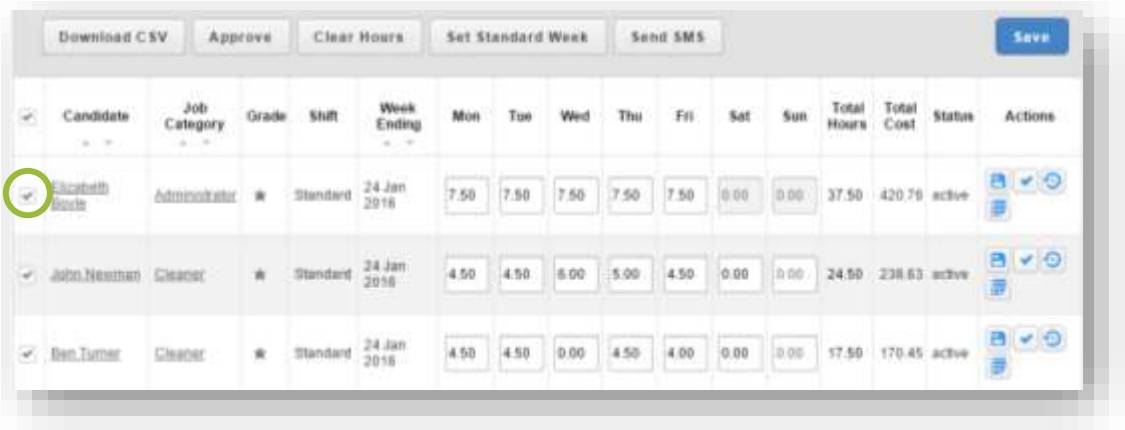
- To override the rules, check the **Override Rules** box and manually enter the total hours that should be paid at each rate band. The total hours in the details section must match the total hours on the timesheet otherwise they will show in red and will not save.

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

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.

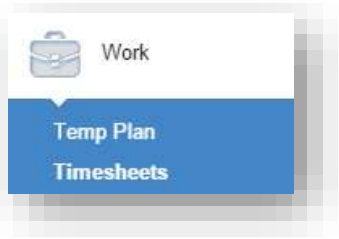
- To save multiple timesheets at the same time, check the boxes on the left of the rows that need saving and click **Save**.



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**.



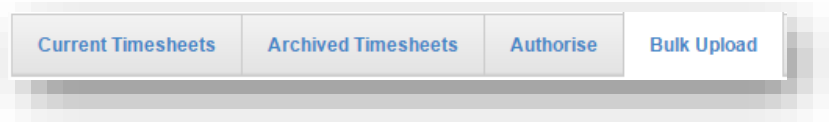
2. Use the filters to select the client and click **Download CSV**. This will download all the timesheets for the selected filters or if the tick boxes are checked then all the selected timesheets.

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.

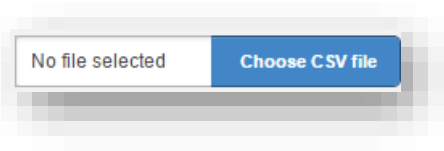
Timeshee	Candidate	Candidate	Business U	Job Categ	Grade	Shift	Week enc	Mon	Tue	Wed	Thu	Fri	Sat	Sun
91073	TN 28 12 8	Mark Adar	Warehous	Canteen N		0 Nights	18-Oct-15	0	0	8.5	9	8	8	0
91075	JK 40 05 4	Peter Barr	Warehous	Fresh Goo		0 Nights	18-Oct-15	9	8	8	8	8	0	0
91074	JM 06 24 1	David Blai	Warehous	Canteen N		0 Nights	18-Oct-15	0	0	0	0	0	0	0
91071	JM 50 73 9	Ryan Dayt	Warehous	Canteen D		0 Days	18-Oct-15	0	8.5	5	5		0	0
91072	JW 57 67 3	Robert Do	Warehous	Freezer N		0 Nights	18-Oct-15	8	8	0	0	0	0	0
91077	SN 43 35 3	Ben Gregc	Warehous	Freezer N		0 Nights	18-Oct-15	8	7.25	0	0	0	0	0
91078	SC 67 21 6	Thomas K	Warehous	Fresh Goo		0 Nights	18-Oct-15	0	0	0	8	8	8	8
91079	NB 86 57 3	David Lovi	Warehous	Canteen N		0 Nights	18-Oct-15	0	0	8.5	9	8.75	8	0

4. Save the spreadsheet in csv format.

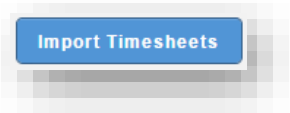
5. On Flo, click on the **Bulk Upload** section on the Timesheets page.



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



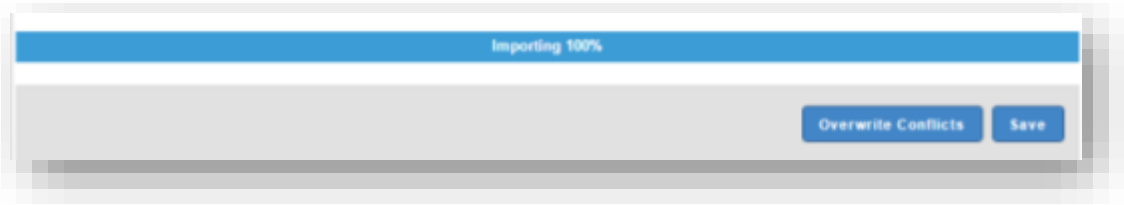
7. Select the file for importing and click **Import Timesheets**.



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

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

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.

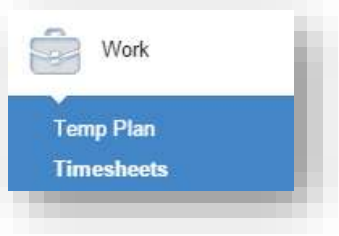


11. The data will now be saved on the Flo timesheets page ready for approval and authorisation.

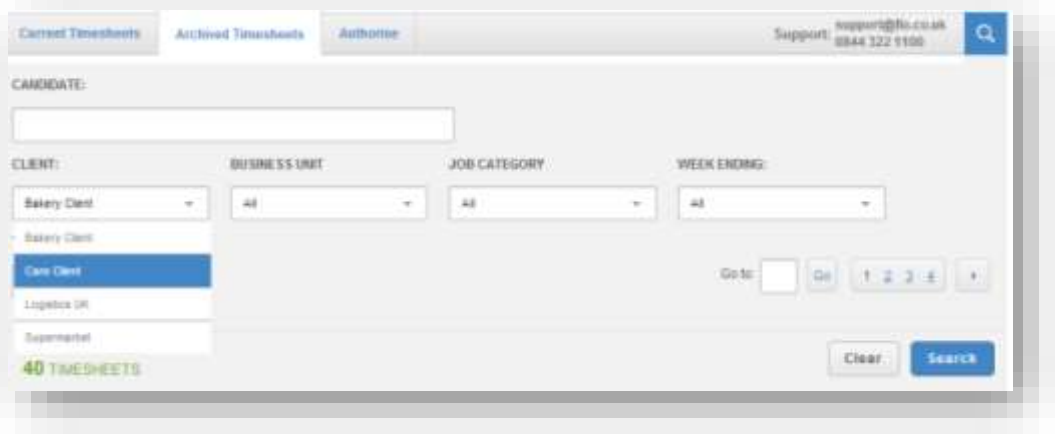
Archived Timesheets

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

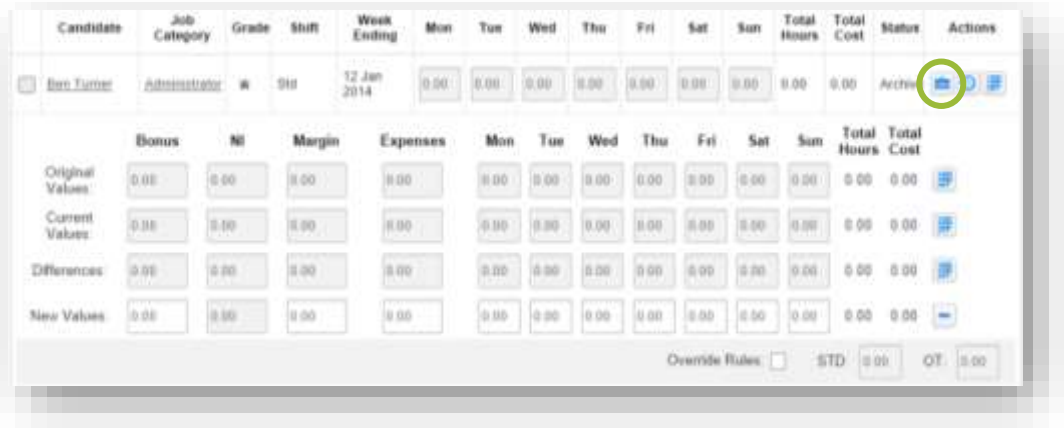
1. On the Menu go to **Work**, **Timesheets** and click on the **Archived Timesheets** tab at the top of the page.



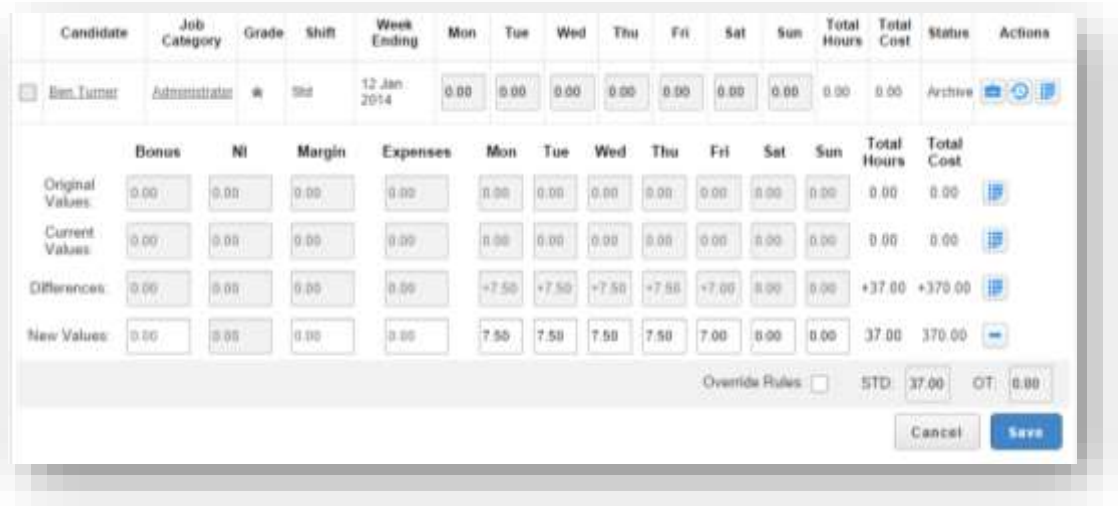
2. Use the filter boxes at the top of the page to find the specific timesheet that needs editing.



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



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.

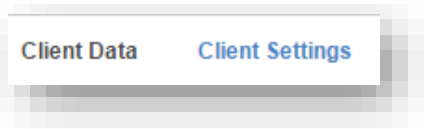


The difference in cost will be added/deducted from the next Client invoice as appropriate.

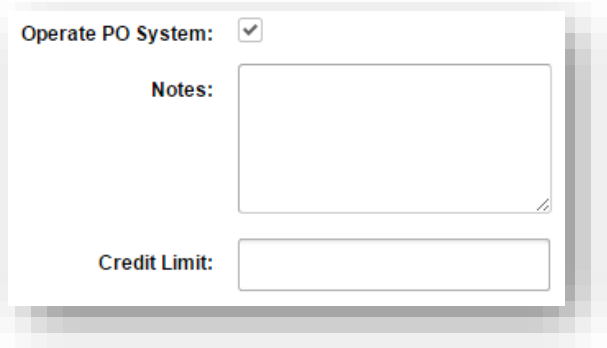
PO Numbers

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

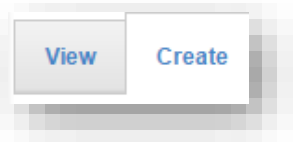
1. On the menu, go to the **Clients** section, find the Client and click on Client Settings.



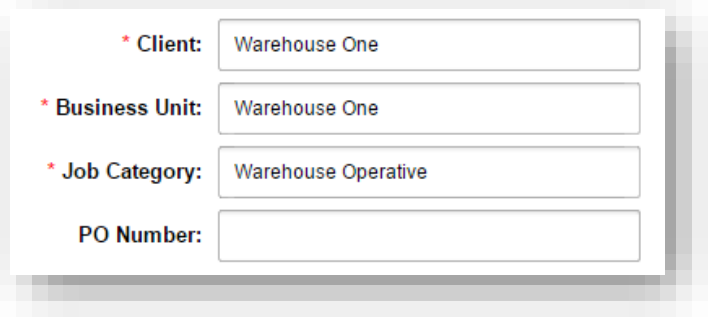
2. Click the "**Operate PO System**" checkbox.



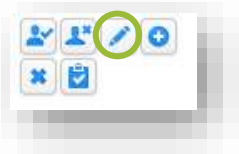
3. Go to **Work** and **Temp Plan** and click on **Create**.



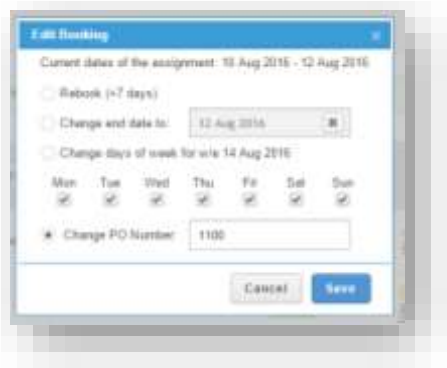
4. Type the name of the Client, Business Unit and Job Category, and the PO Number field appears.



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



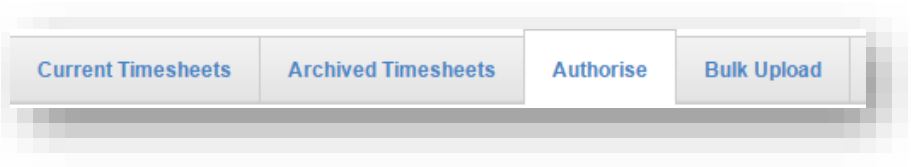
6. Click on the **Change PO Number** radio button, edit the number and click Save.



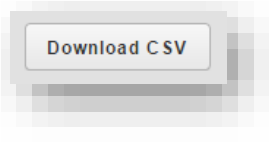
7. On the Timesheets, click on the details button.

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

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



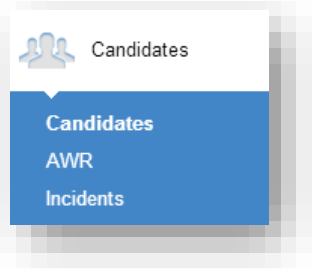
10. Click on **Download CSV**.



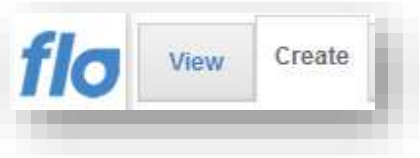
CANDIDATES

Creating a New Candidate

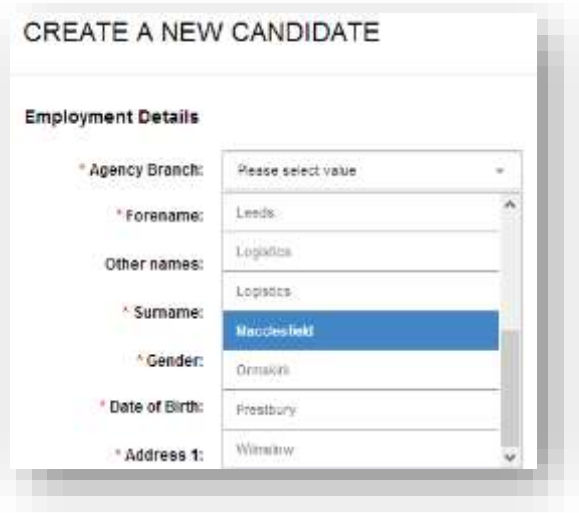
1. On the menu, go to the **Candidates** section.



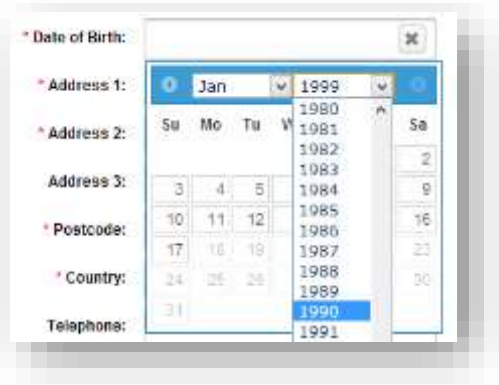
2. At the top of the page, click on **Create**.



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



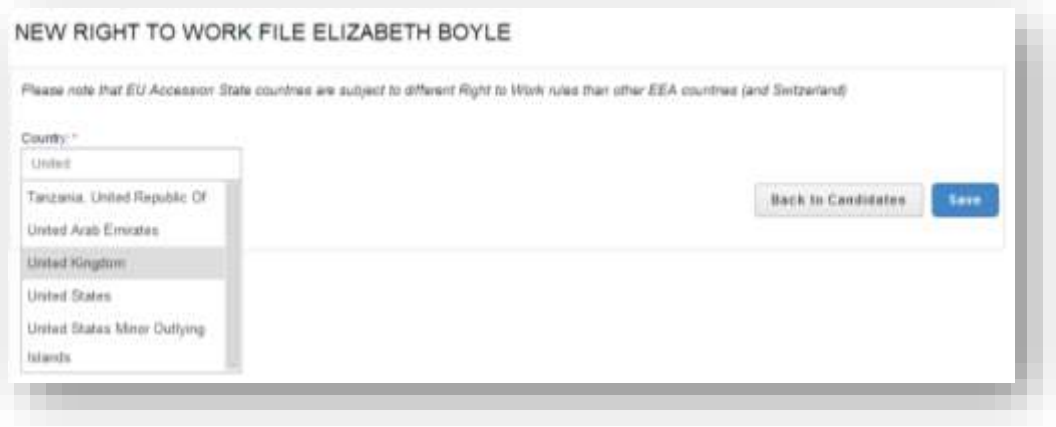
4. To enter the Date of Birth, click on the box and first select the **Year**.



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

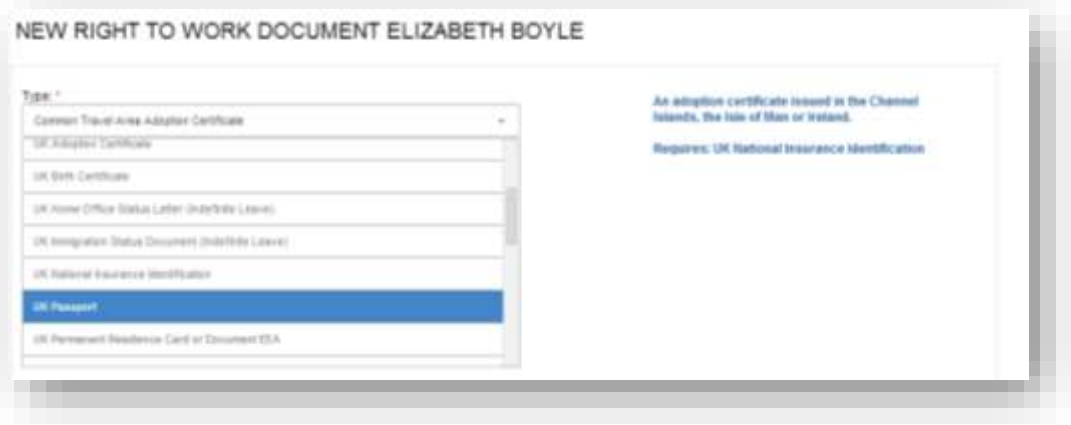
6. Once all the fields have been completed, click **Save Candidate**.

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

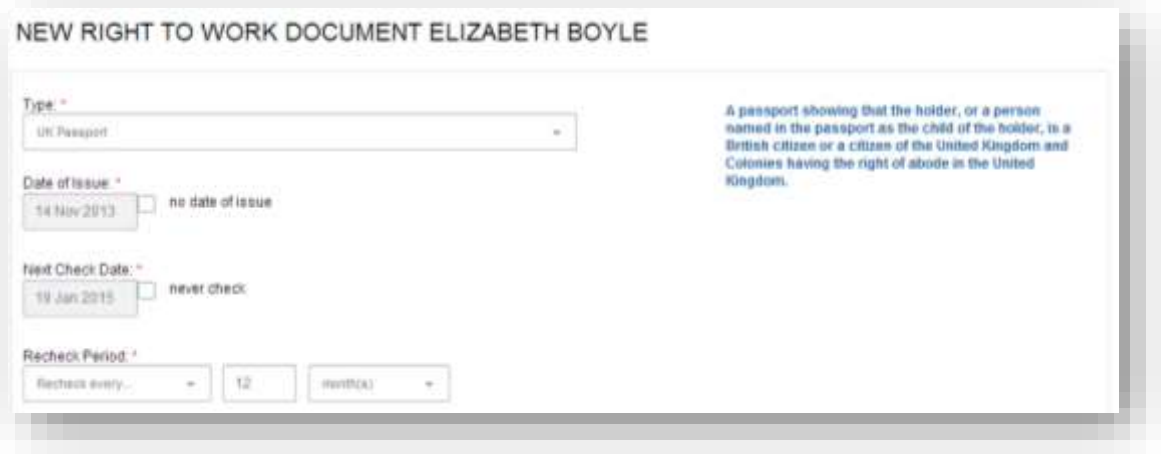


8. Click on **Add a Document**.

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

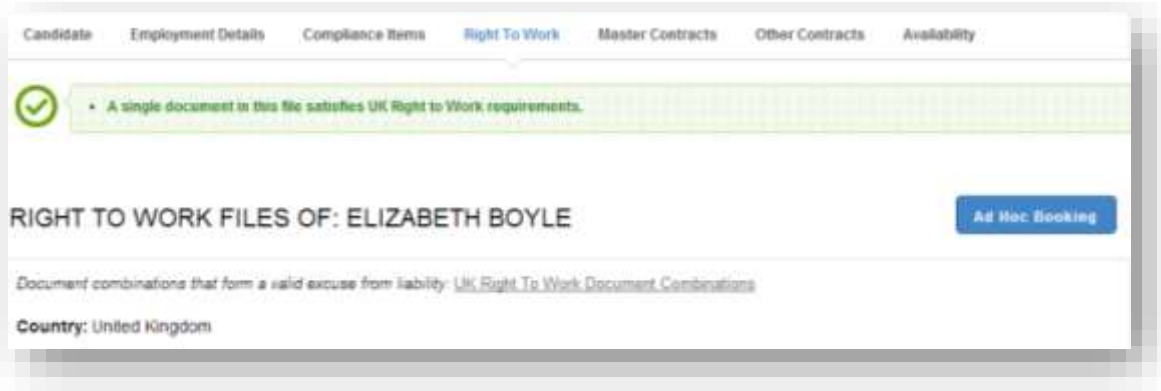


10. Fill out the details required for this document, including the **Date of Issue**, the **Next Check Date** and the **Recheck Period**.



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

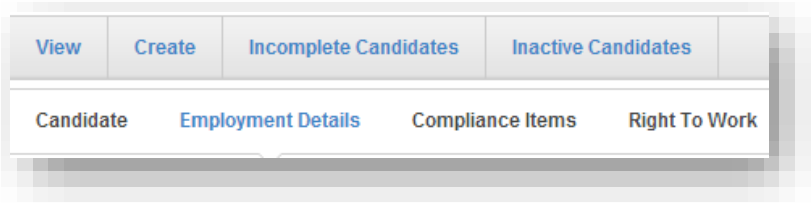
12. A green message will appear at the top of the Right to Work page indicating that the document satisfies the requirements.



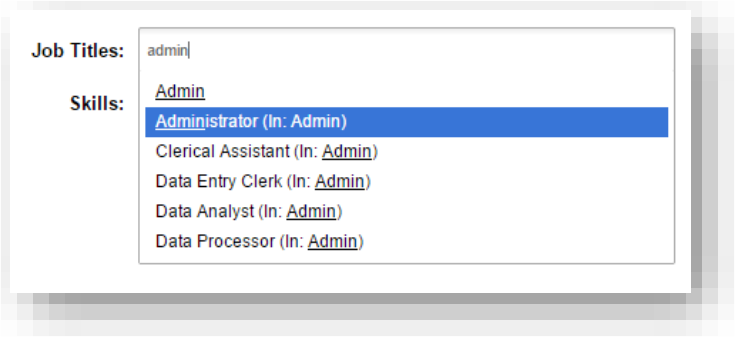
Editing a Candidate

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

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

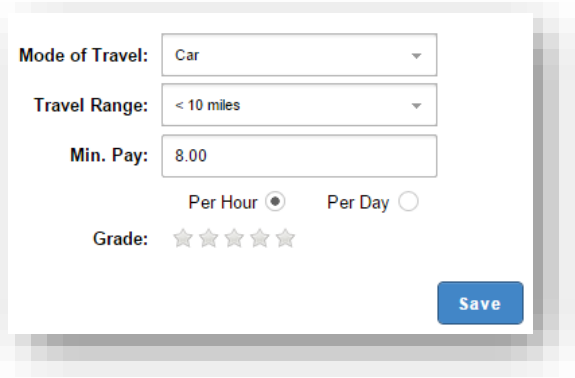


3. To add a **Job Title**, start typing in the box and select from the dropdown list which is prefilled from the Dictionary*.

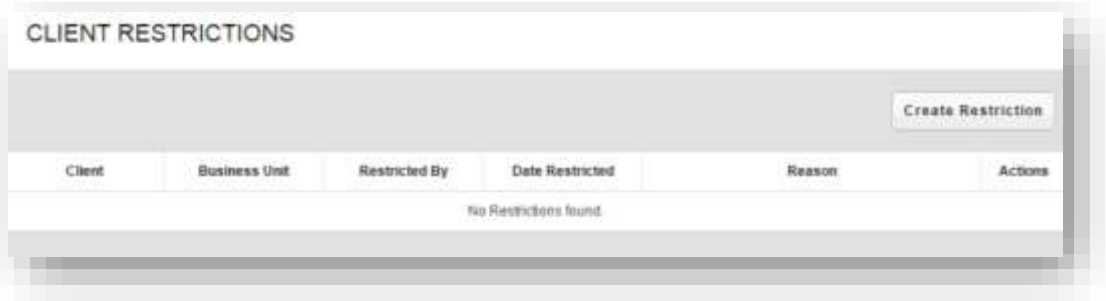


*If you have permission to edit the Job Titles dictionary, you can add new Job Titles from this page by typinginto the box and saving the entry. This will also add the Job Title to the Dictionary.

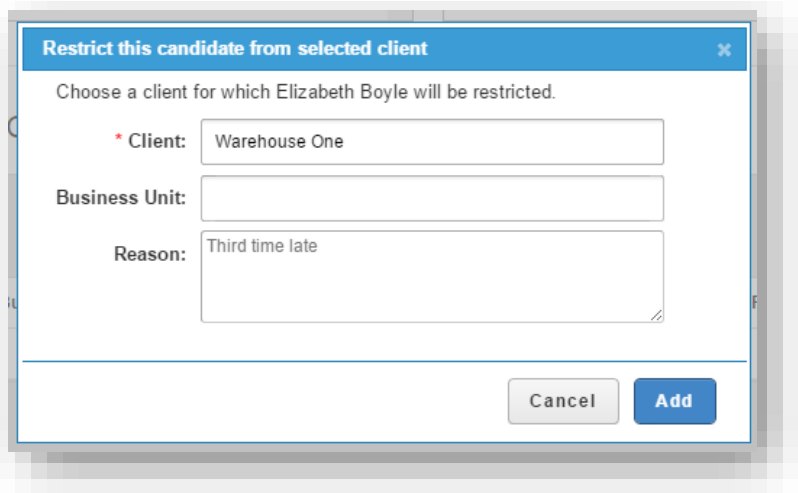
4. Use the boxes to edit the drop down options for the candidate's travel and pay and click **Save**.



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



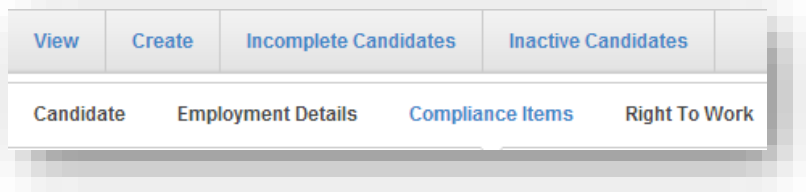
6. Type the name of the Client and Business Unit (if required), use the Reason box to type a description and click **Add**.



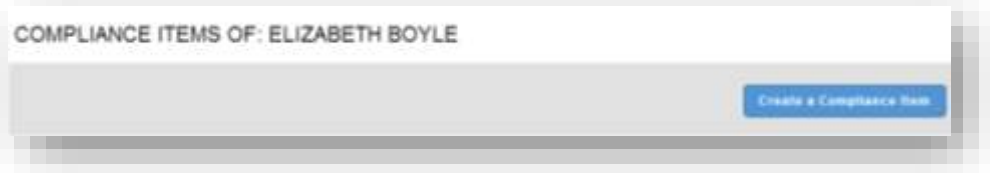
7. This Candidate will now be blocked from bookings for this Client.

Compliance Documents

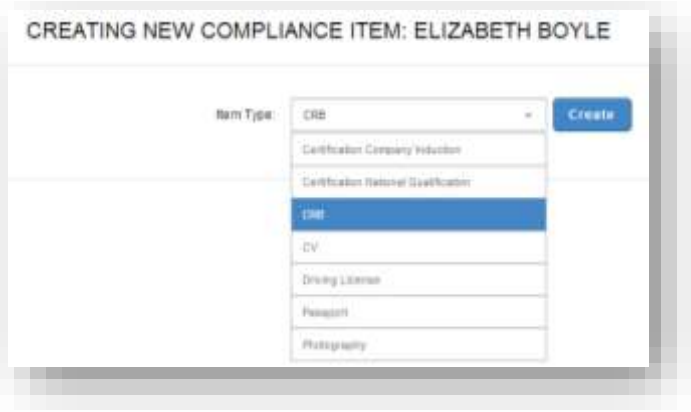
1. To edit the **Compliance Items**, click on this tab at the top of the page.



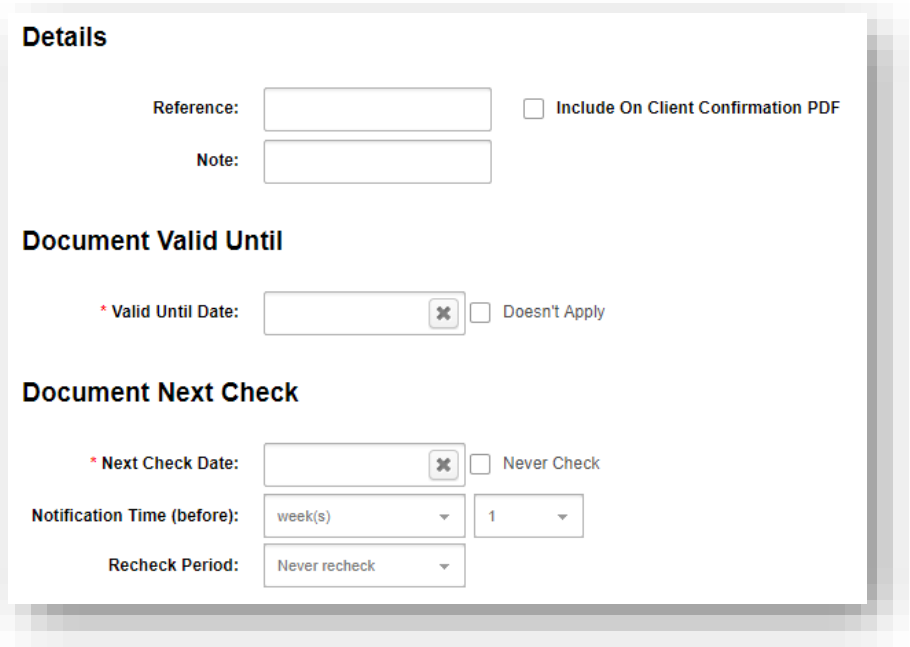
2. Click on **Create a Compliance Item**.



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**.



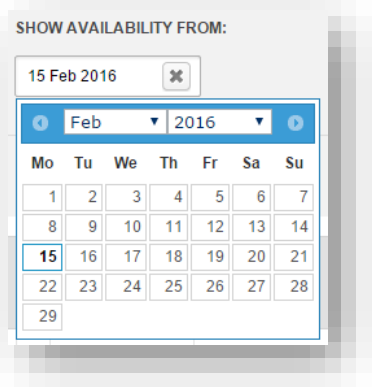
5. Upload the document and click **Save**. It is possible to upload multiple files for the same Compliance Item.

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

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.

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



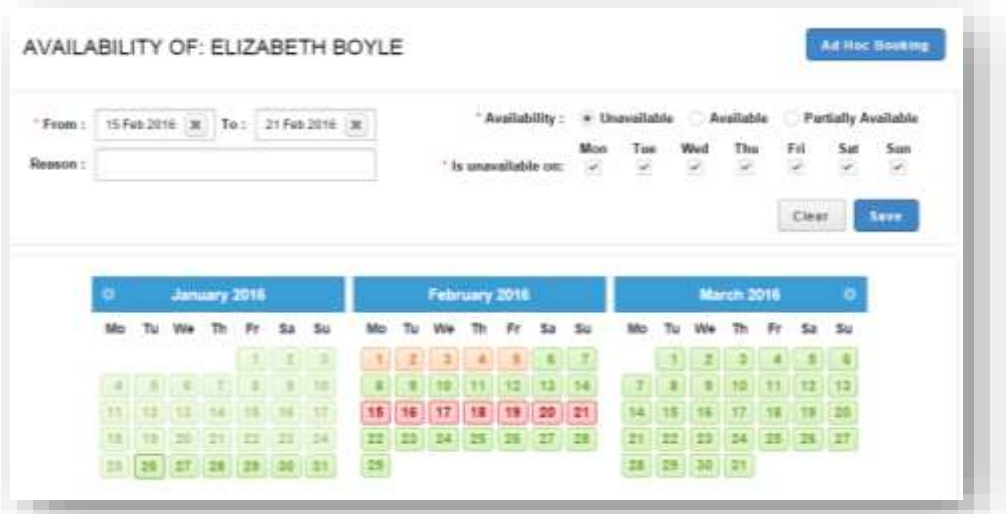
3. To edit a candidate's availability, or to view the full availability calendar, click on any of the availability boxes in the days of the week.

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

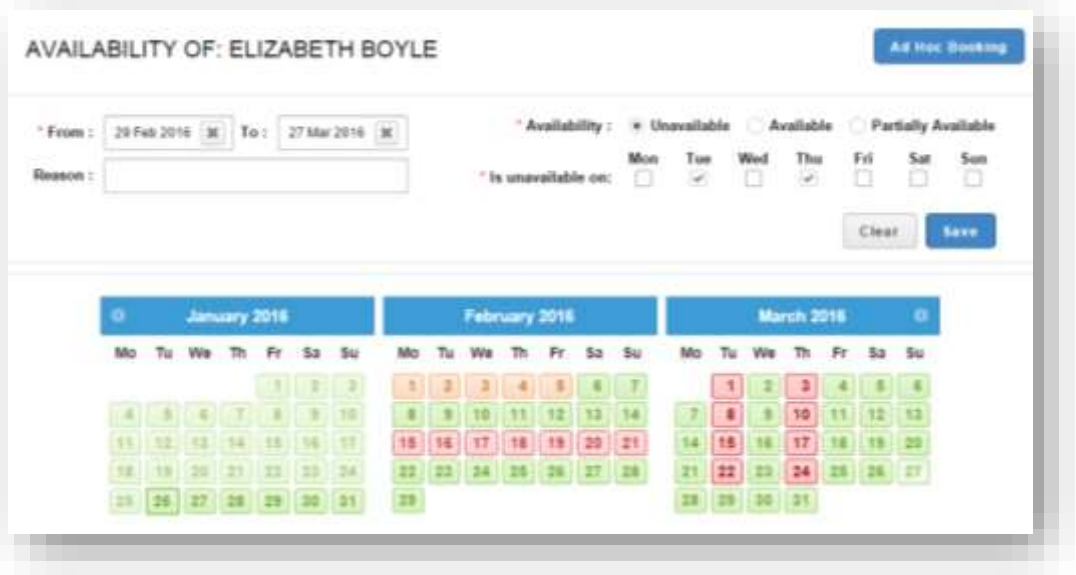
5. There are 3 options for setting the Availability:

- **Available**
- **Unavailable**
- **Partially Available**

6. 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**.

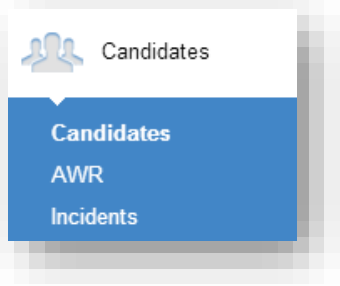


7. To select availability for certain days of the week, click on the period and leave the relevant day boxes checked. This will update the checked boxes for the period selected.



Adding Notes to a Candidate

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



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

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

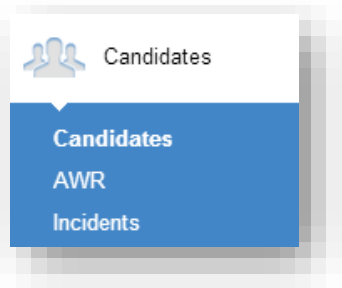
4. Type the **Title** of the Thread and add the details to the **Note** section.

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**.



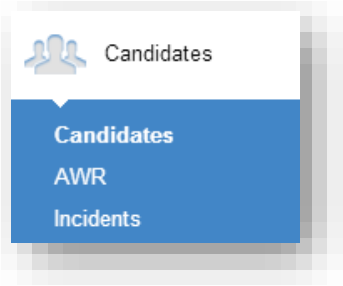
2. Find the row of the Candidate that needs a contract uploading and Click on the **Contract** icon.

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

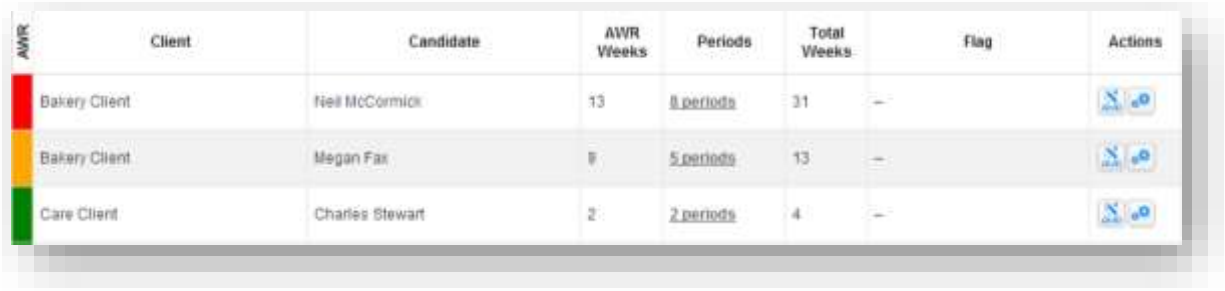
1. On the Menu, go to the **Candidates** section and click on **Candidates**.



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

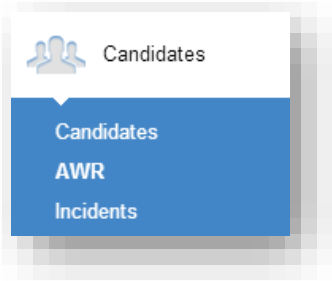
AWR

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.

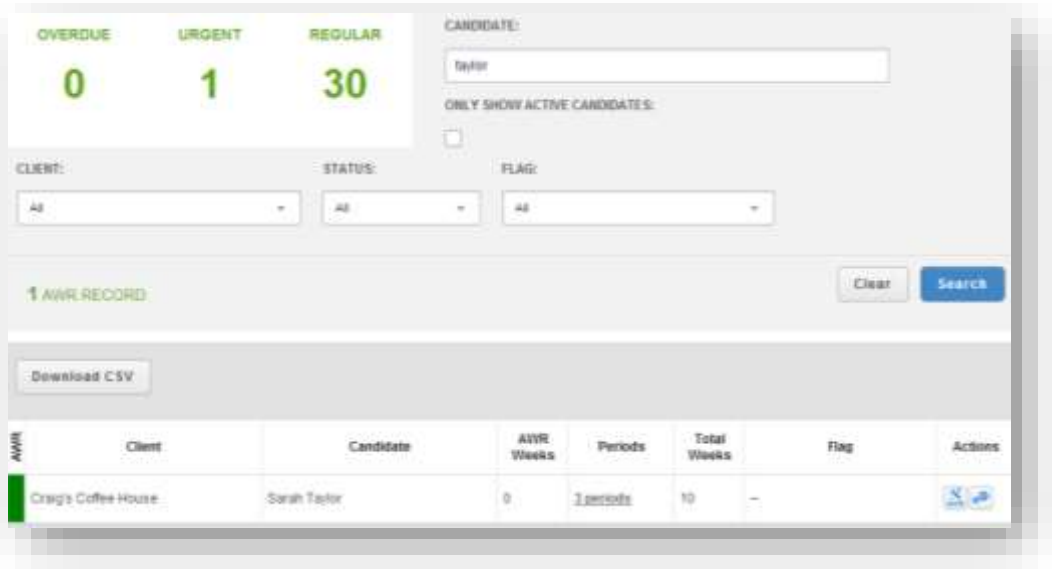


Defining Break Types

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

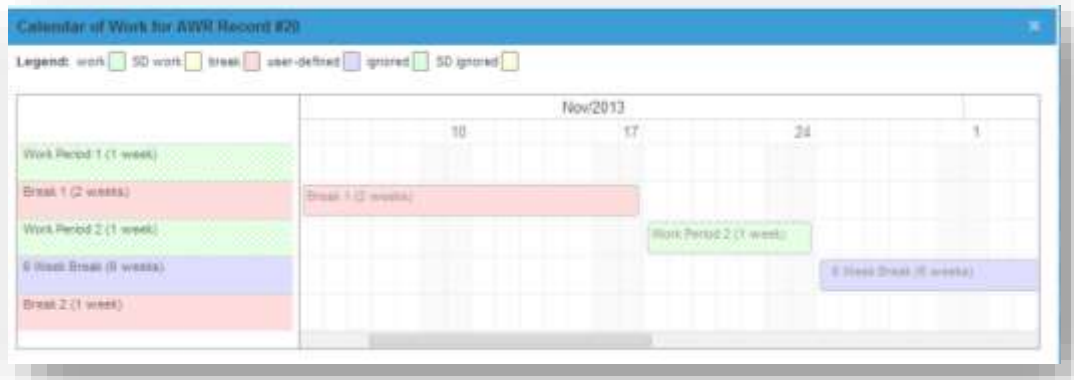


2. Use the filter boxes at the top of the page to find a specific AWR record.

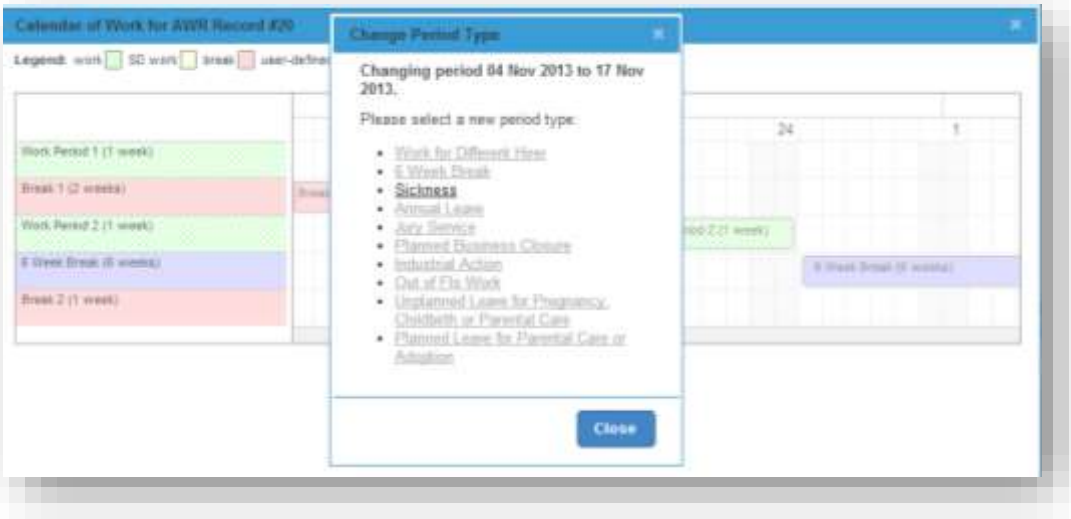


3. To view the Gantt chart for this candidate's record, click on ***x* Periods**.

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.

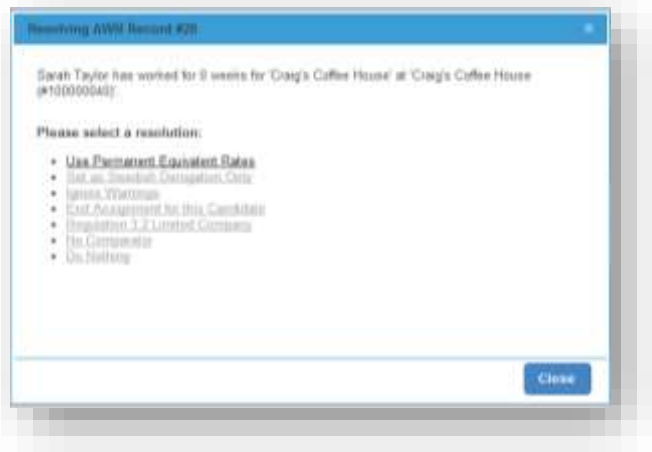


Resolving AWR Records

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.



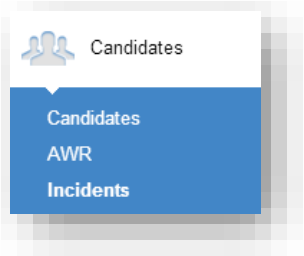
3. The AWR record changes to grey once it has been successfully resolved.

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**.

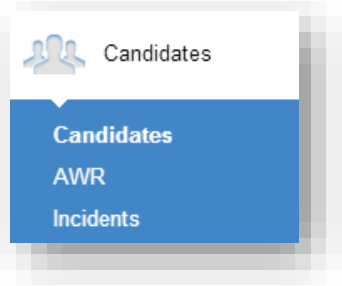
3. Fill in the details of the incident from the drop down boxes. (Incident codes must be defined for each Client in the Dictionary).

SMS TEXTING

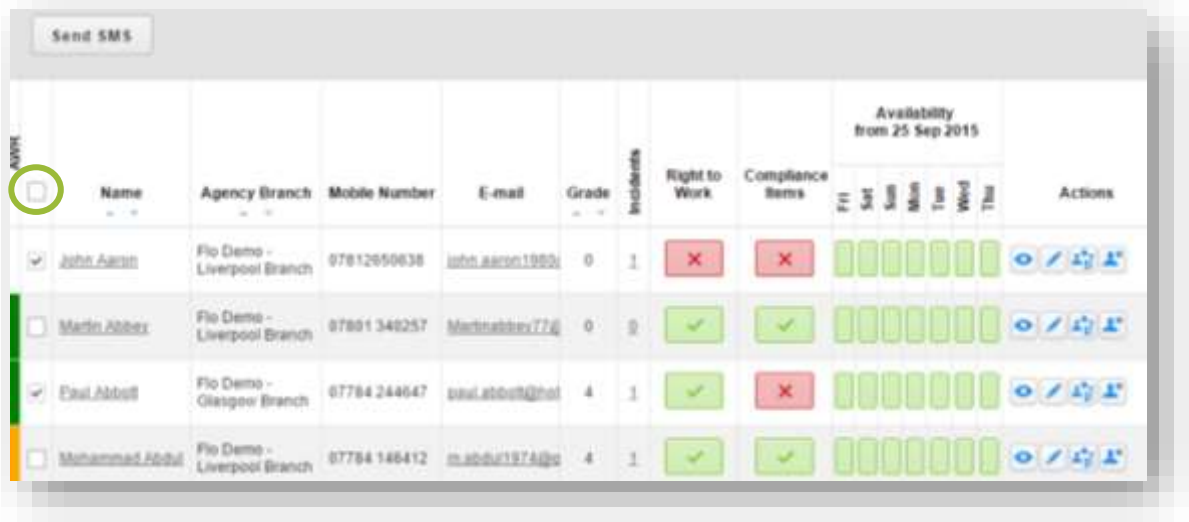
If the SMS function is switched on in, there will be a “Send SMS” button on the following pages:

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

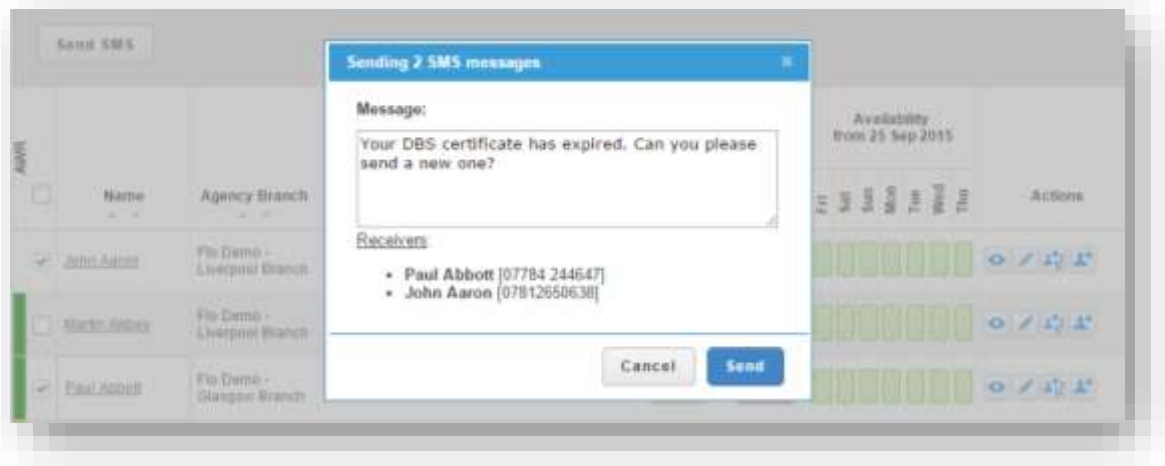
1. On the Menu, go to **Candidates** section and click on **Candidates**..



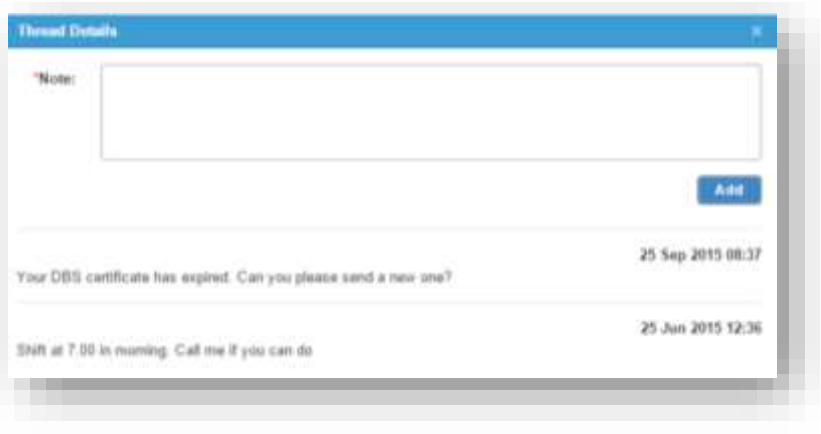
2. Use the select boxes on the left hand side to choose which candidates to send the message to and click "**Send SMS**". To choose everyone on the page, use the Select All box at the top.



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



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



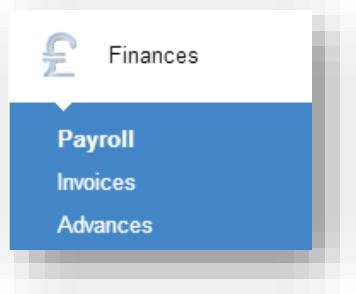
5. An email will also be sent to the Flo user's email address with confirmation of delivery to the candidates.

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.

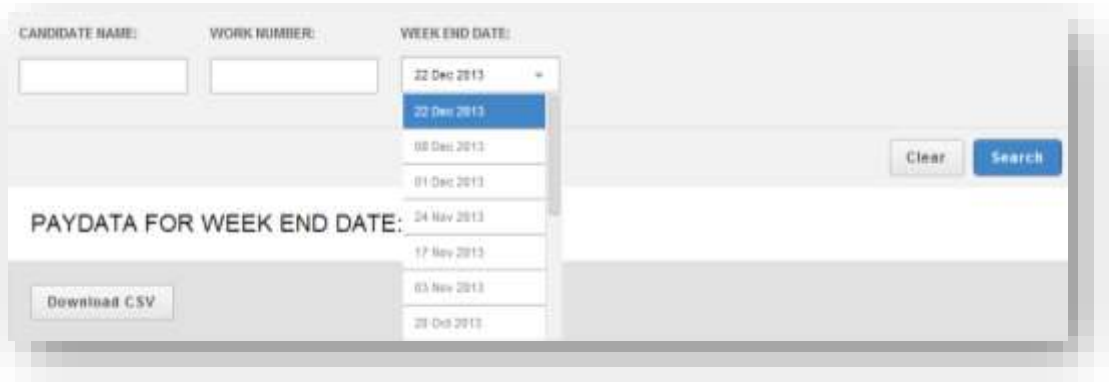
FINANCES

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**.

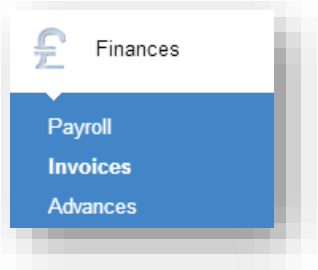


3. To export data to Excel, select which rows are required and click **Download CSV**.

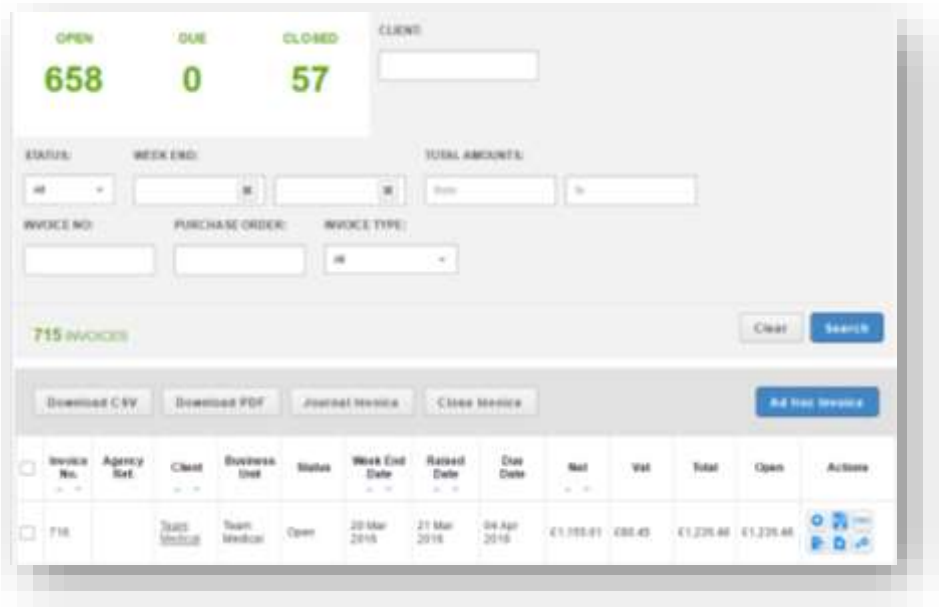
Invoices

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**.



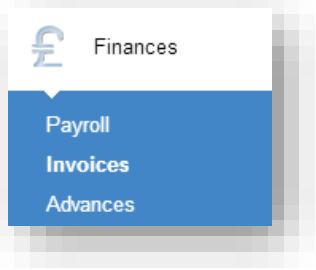
2. Use the filter boxes to find the invoice required.



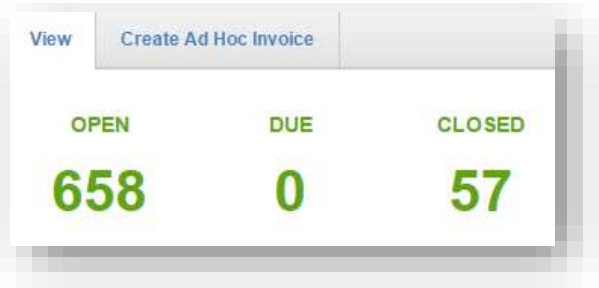
3. Use the Action buttons on the right of the row to do various tasks, including: **Download PDF**, **Export CSV Breakdown**, **Close Invoice**, **Journal Invoice** and **Manage Invoice**.

Adhoc Invoices

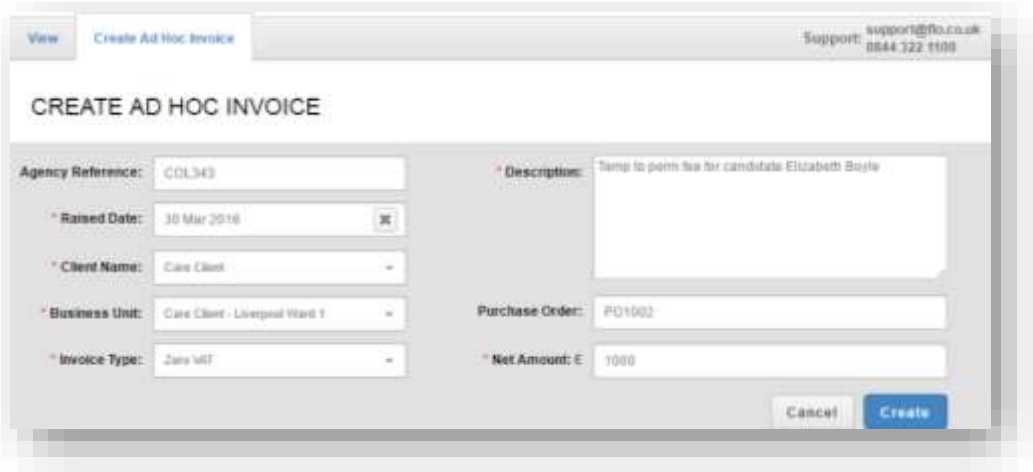
1. On the Menu, go to **Finances** and **Invoices**.



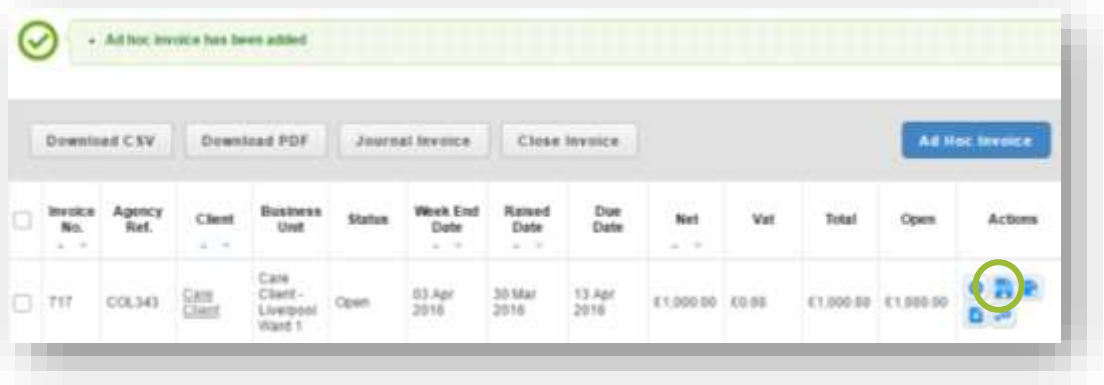
2. Click on **Create Adhoc Invoice**.



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

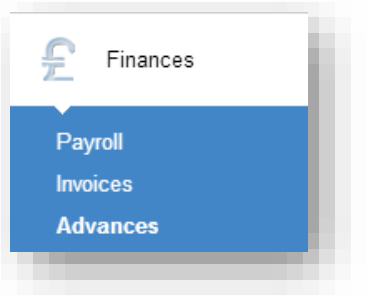


4. The PDF will now be available by clicking on the PDF action button.



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 16:11:59	£+
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.**

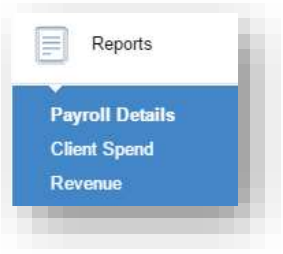

CREATE NEW NET DEDUCTION FOR RYAN STEWART
* Sum to Deduct:
1.00
Total Balance of Advances:
2.50
Note:
Paid on 01/05/2014 - Stacey
Cancel
Submit

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**.

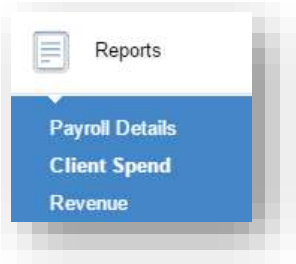


2. Select the names of the candidates required and click **Download CSV**.

Client Spend Report

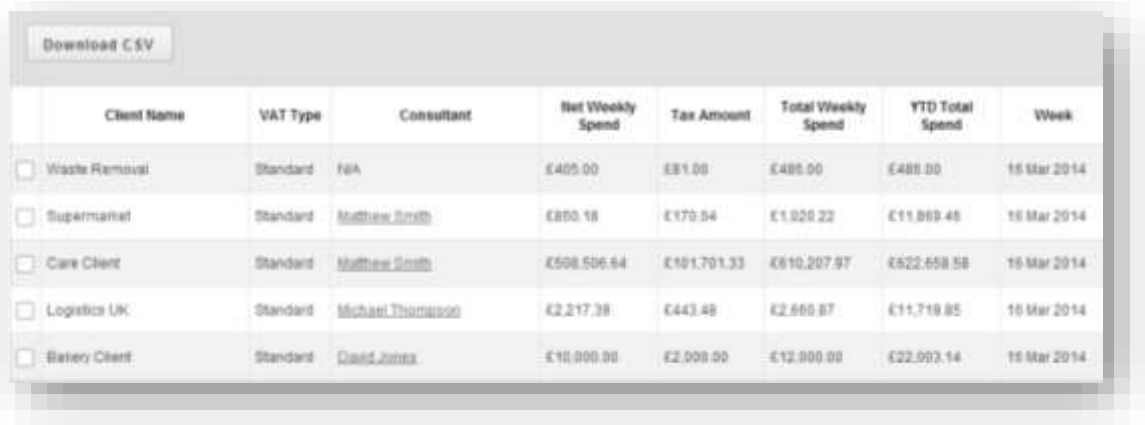
The Client Spend Report is produced each week during consolidation. This report gives details of the total spend per client for any given week.

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



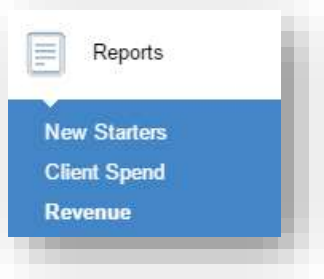
2. Use the filter boxes at the top to find the required week ending and click **Search**.

3. 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.

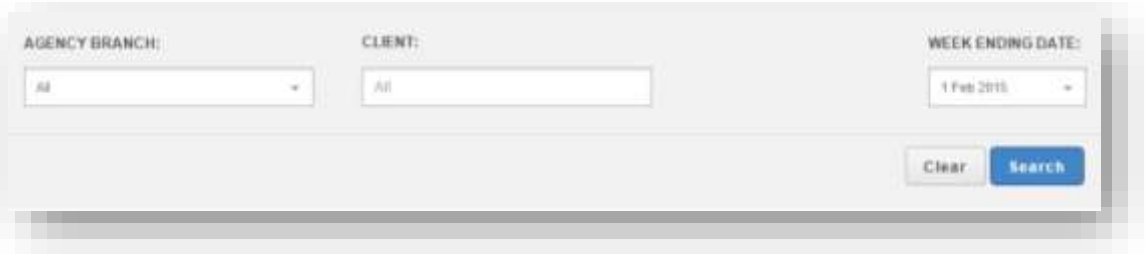


Revenue Report

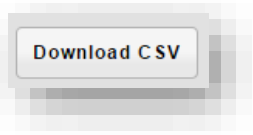
1. On the Menu, go to **Reports** and **Revenue**.



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



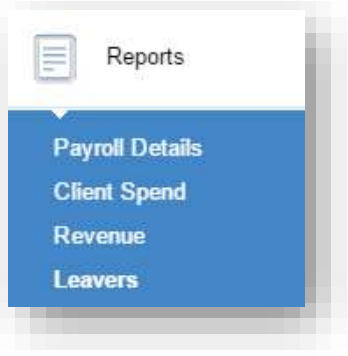
3. To export the information, click on the **Download CSV** button.



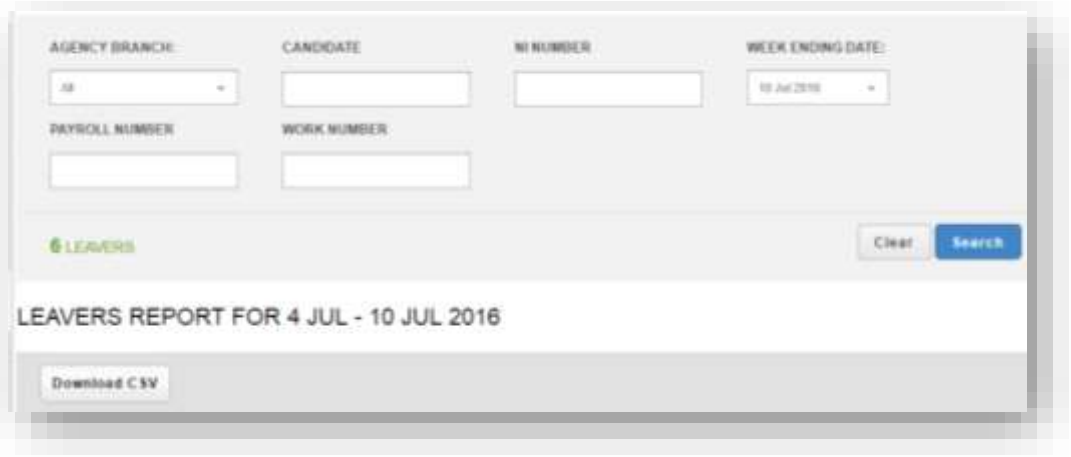
Leavers Report

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

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



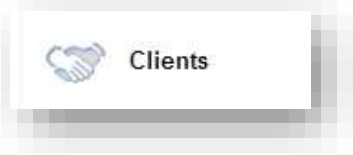
2. Click on **Download CSV** to export the data to Excel.



CLIENTS

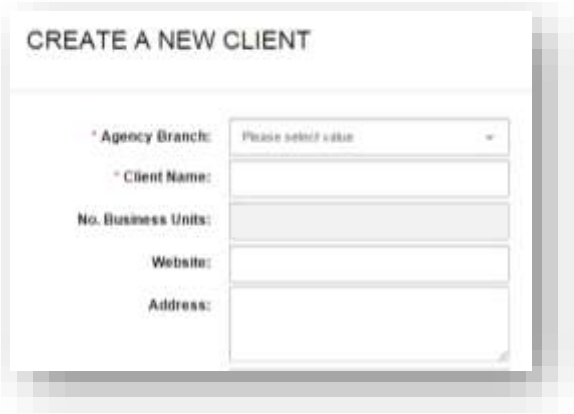
Creating a New Client

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

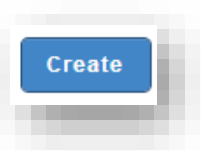


2. At the top of the page, click on **Create**.

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



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

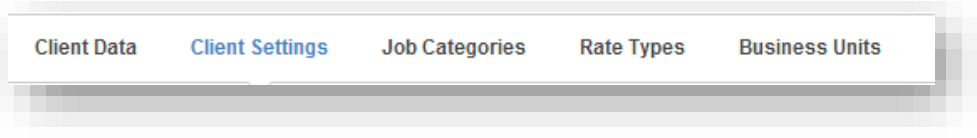


5. To activate the Client, click on **Activate**.

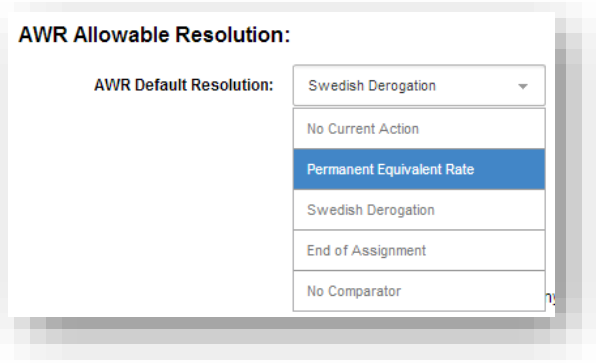
Edit Client Settings

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

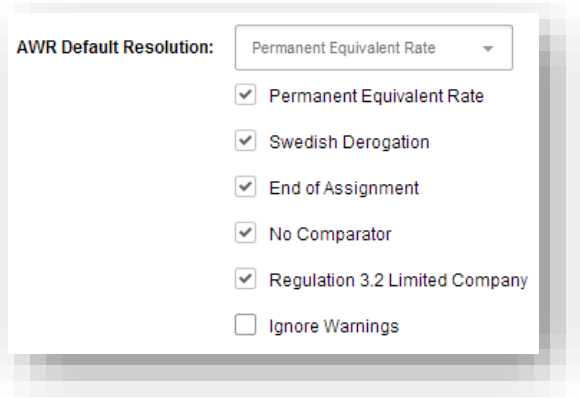
2. Click on **Client Settings** at the top of the page.



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**.



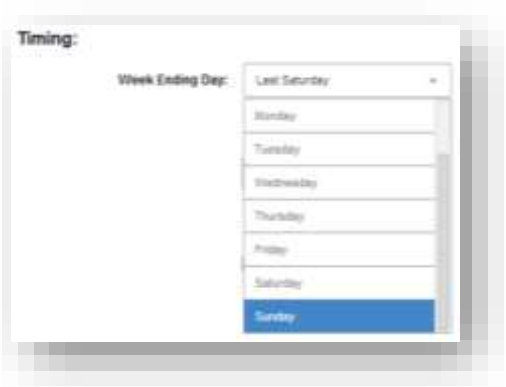
4. Select all resolutions that are applicable to this Client. All resolutions will be available for Agency Users, but only the selected resolutions will be available for Client Users.



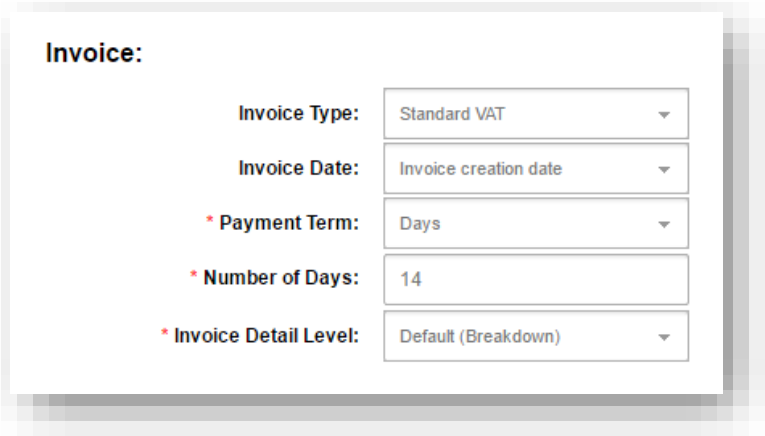
5. Set when a Candidate's AWR record changes from green to orange for a Client user, to display a warning that the end of the qualifying period is approaching. The **Warning Limit** is the number of AWR weeks worked.

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.

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.

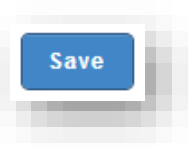


8. Change the invoice settings for this client by using the options in the dropdowns.



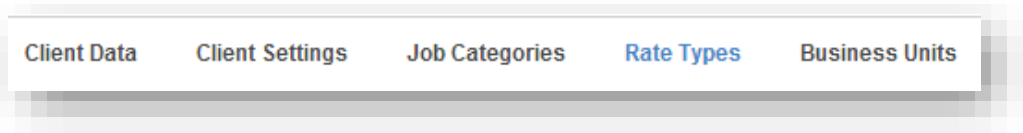
a. Select whether the invoices for this Client include VAT by clicking on Standard (20% VAT), Reduced (5% VAT) or Zero (0% VAT).
b. Change the Invoice Date by selecting Invoice Creation Date (the date of consolidation), Client weekending date (the last date of the timesheet), or system weekending date (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**.

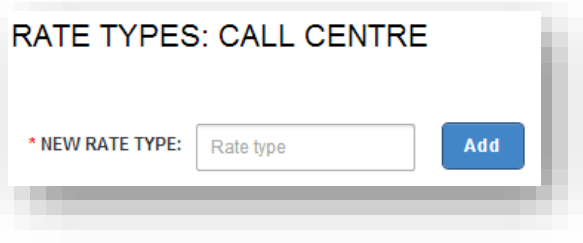


Edit Rate Types

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



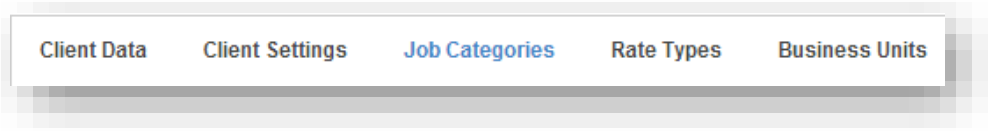
2. Type the new Rate Type in the box and click **Add**. The default Rate Types already set up are STD, OT, SAT, SUN and BH. These are not job specific and will be used for all jobs for this Client.



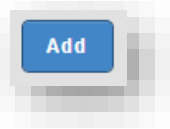
3. To edit a Rate Type, double click on the word, type the correction and press Enter.

Edit Job Categories

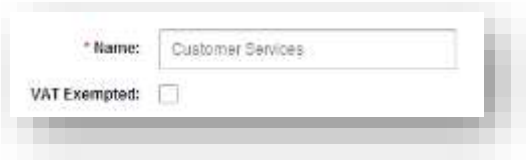
1. To add new Job Categories to this Client, click on **Job Categories** at the top of the page.



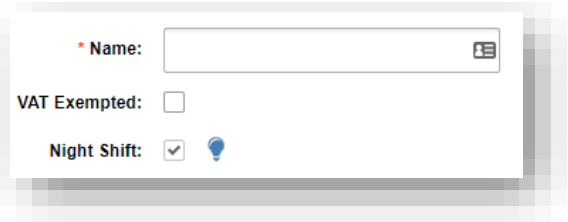
2. Click **Add** on the right of the page.



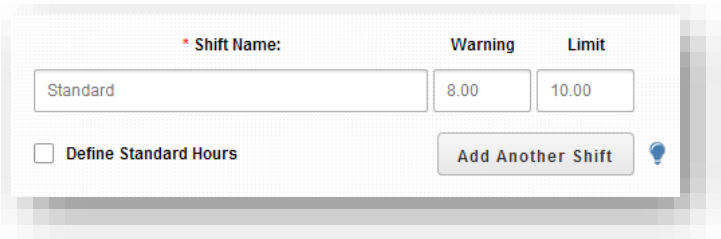
3. Type the **Name** of the Job Category and select whether this is a VAT Exempt role.



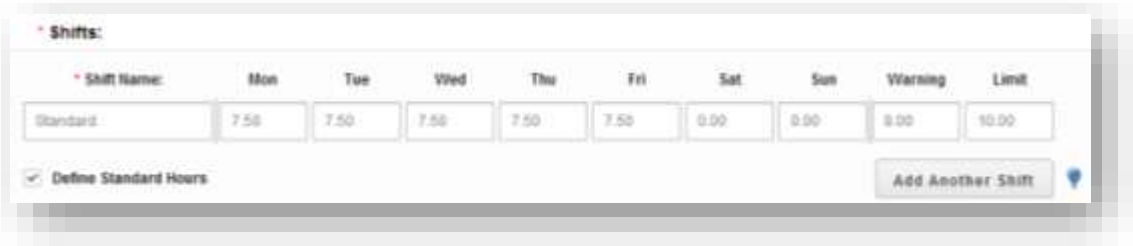
4. If the job category is for a night shift, check the box to enable Night Shift warnings.



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

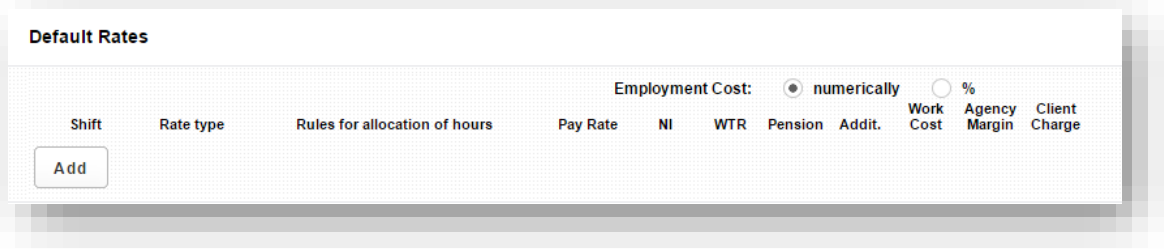


6. To **Define Standard Hours** for this Job, tick the checkbox and fill in the hours in each day.



- 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.

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



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

a) By typing manually into each box*:

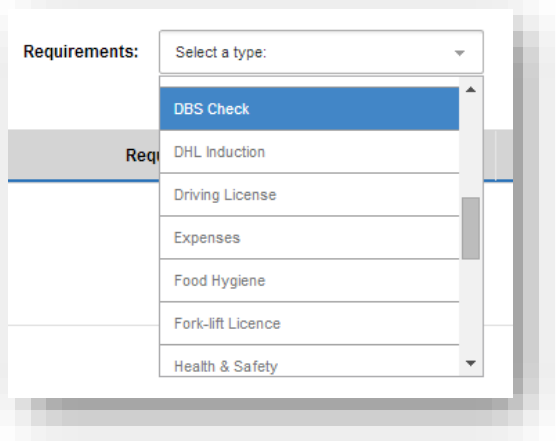
*The NI and WTR boxes provide an hourly average of these figures if required. These are not the actual figures that are calculated at payroll.

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

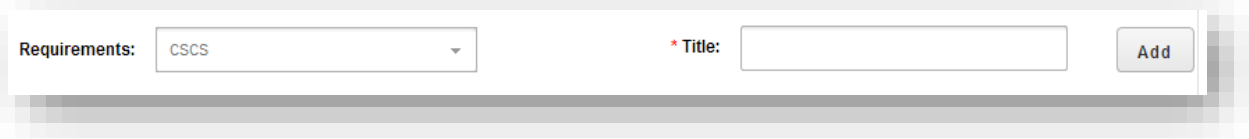
9. Enter the Job Titles from the Dictionary which are required for this role*. These can then be searched for from the candidate database.

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

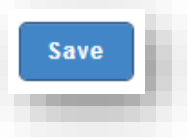
10. If there are any Compliance Items required for this job, select from the drop down list (bespoke Compliance Items can be defined in Settings – Page 65).



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

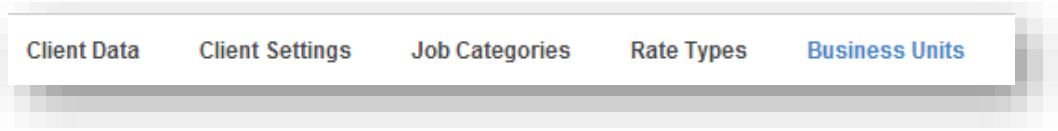


12. Click **Save**.



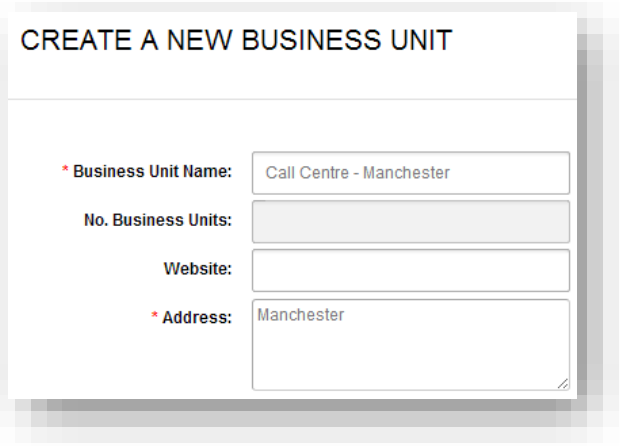
Edit Client Business Units

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



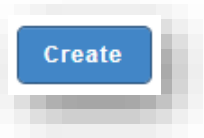
2. Click on **Add Business Unit**.

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.



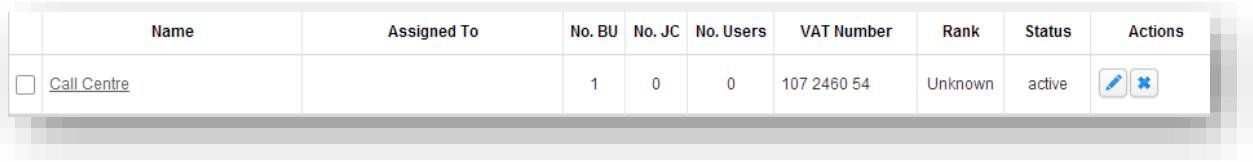
4. Choose the Bank Holiday region for this Business Unit.

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



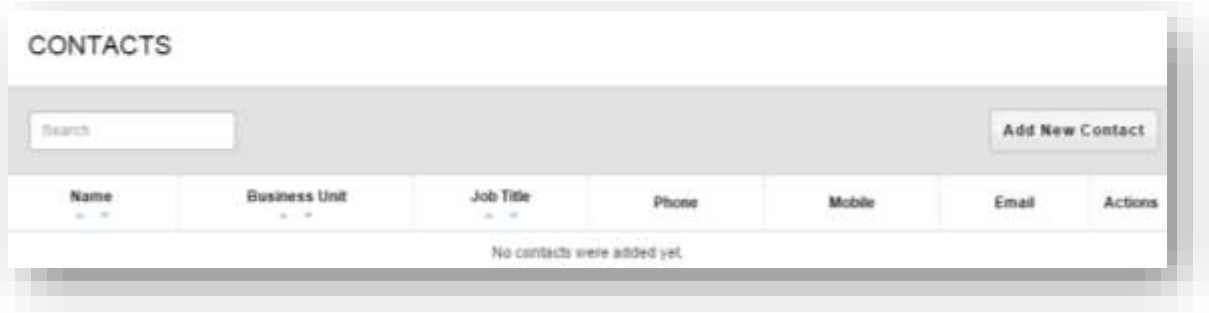
Add Contacts

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

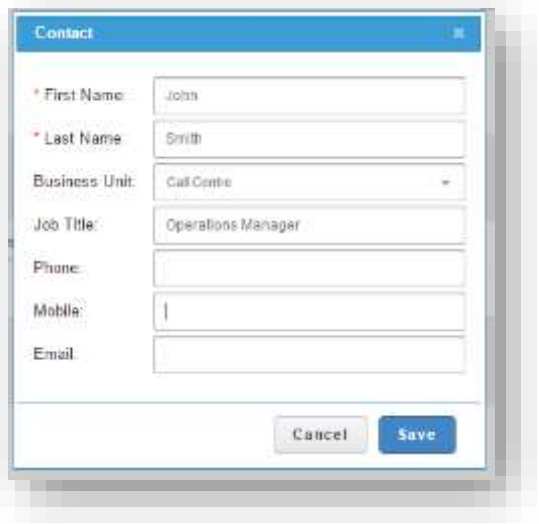


	Name	Assigned To	No. BU	No. JC	No. Users	VAT Number	Rank	Status	Actions
☐	Call Centre		1	0	0	107 2460 54	Unknown	active	

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

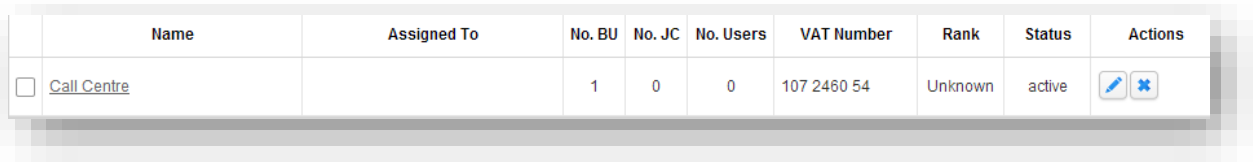


3. Fill out the details for the Client contact and click **Save**.



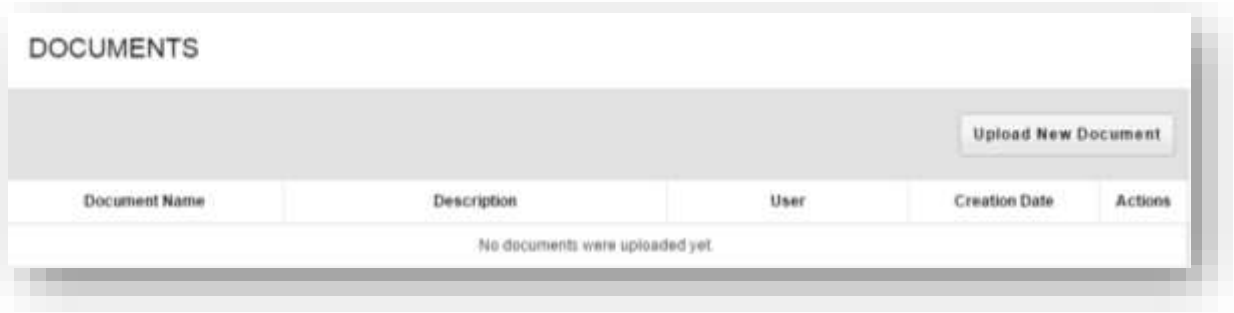
Add Documents

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

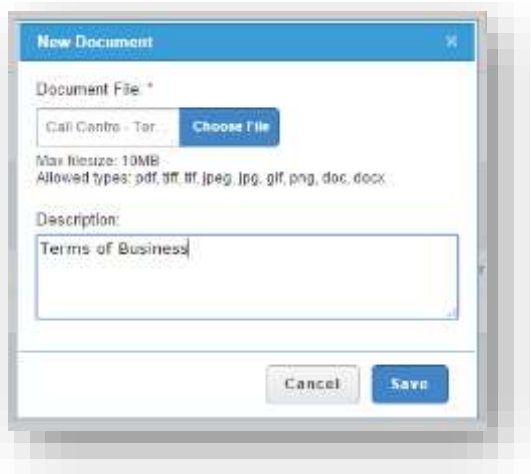


	Name	Assigned To	No. BU	No. JC	No. Users	VAT Number	Rank	Status	Actions
☐	Call Centre		1	0	0	107 2460 54	Unknown	active	

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

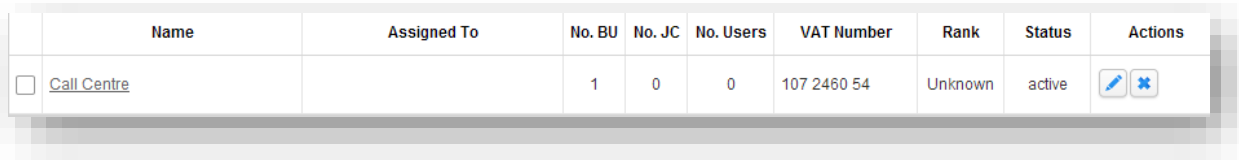


3. Select the file to be uploaded, add a note if required and click **Save**.



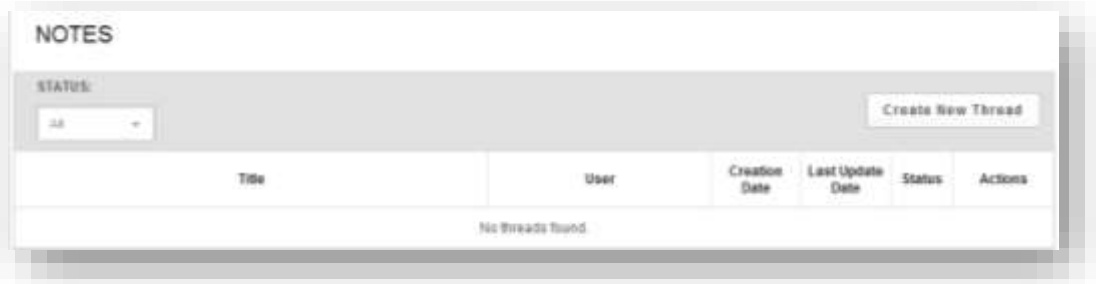
Create Client Notes

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

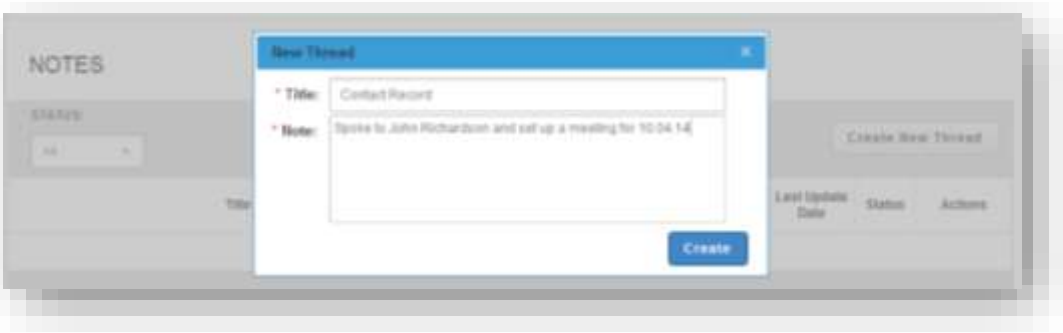


	Name	Assigned To	No. BU	No. JC	No. Users	VAT Number	Rank	Status	Actions
☐	Call Centre		1	0	0	107 2460 54	Unknown	active	

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

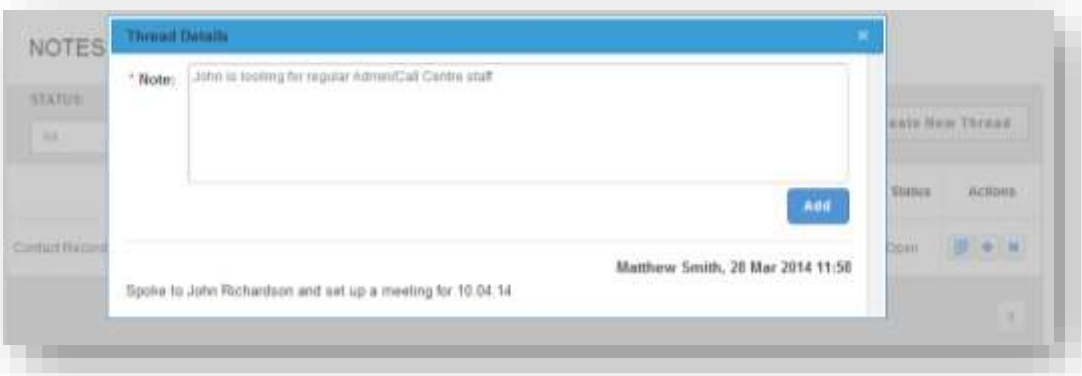


3. Enter the **Title** of the thread, add the first **Note** and click **Create**.



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

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

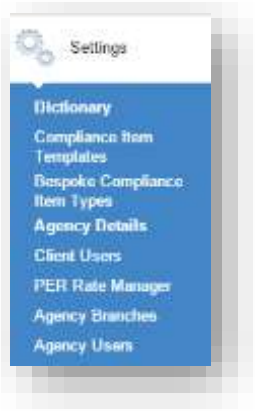


6. If there are multiple Notes Threads, it is possible to make a thread "Sticky" which means that it will always be on top.

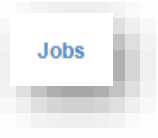
SETTINGS

Dictionary

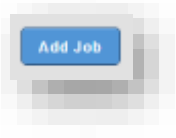
1. On the Menu, go to **Settings** and **Dictionary**.



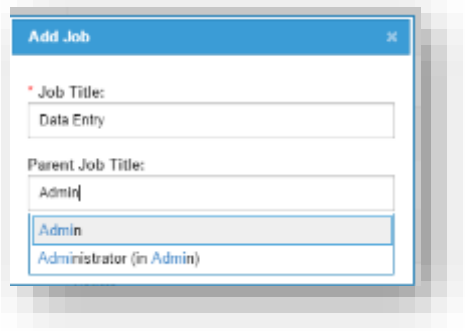
2. At the top of the page, click on **Jobs**.



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).

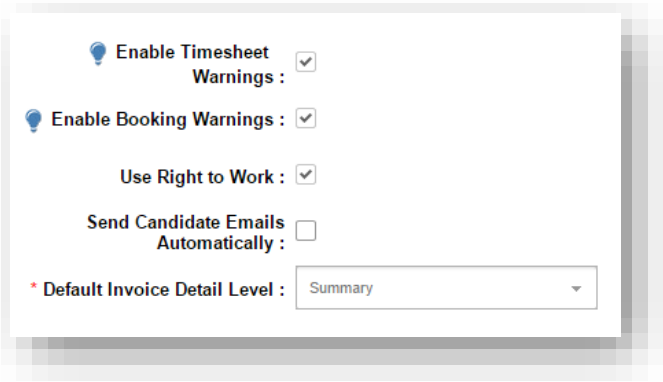


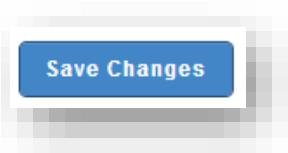
Agency Details

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**.

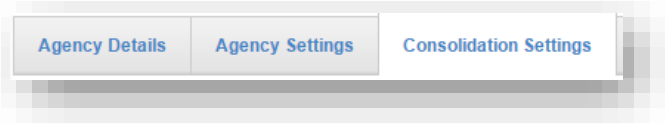




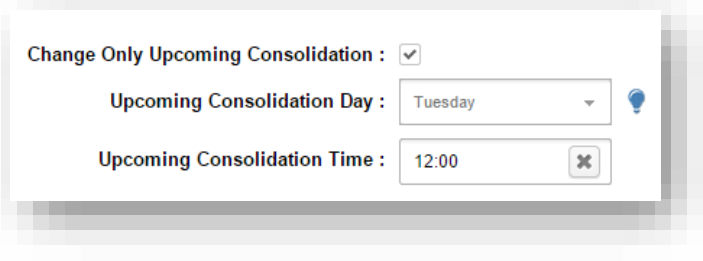
Change Consolidation

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

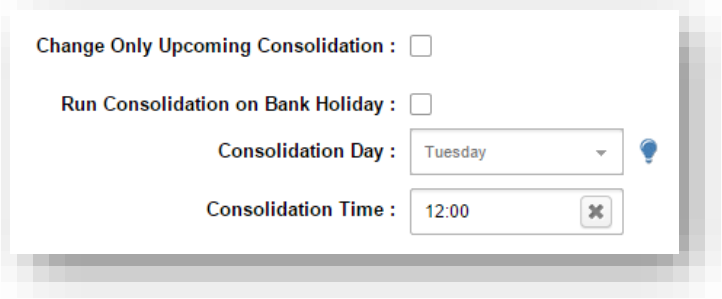
2. At the top of the page, click **Consolidation Settings**.



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**.

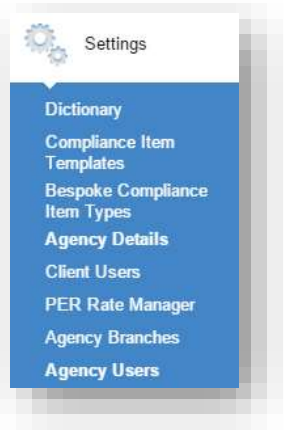


Please note, you will not be able to change your consolidation time if there is less than 5 minutes until your consolidation will run. It is also not possible to select midnight as a time.

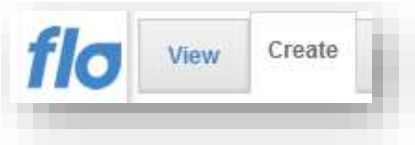
Agency Users

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**.

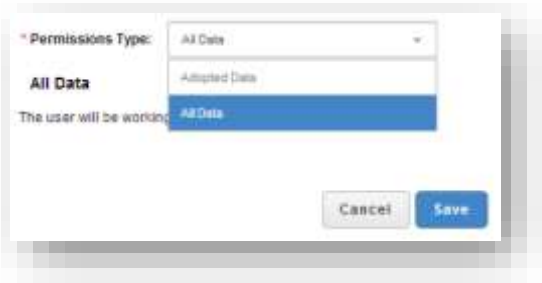


3. Enter the details on the form, including all the mandatory fields (marked with *). The email address will become the username, and this field is <u>case sensitive</u>.

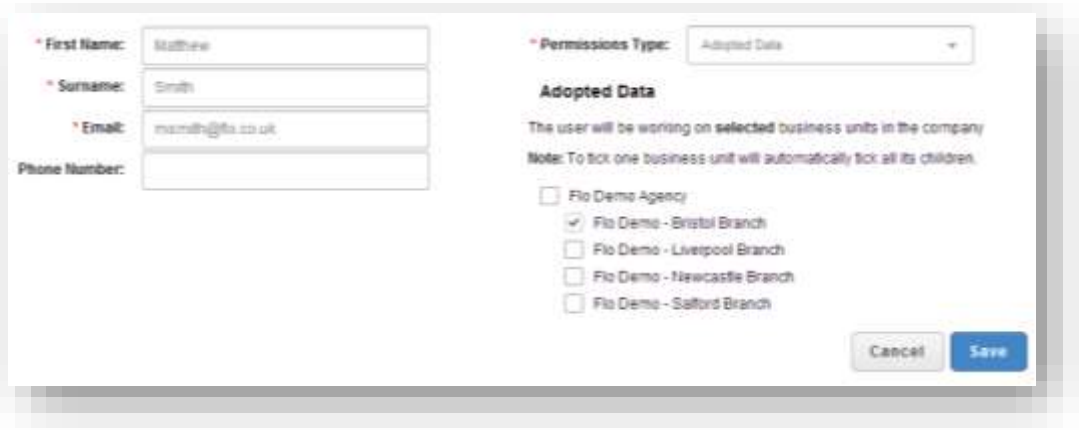
4. Select the Permissions Type and click **Save**.

There are two options for the Permissions Type:

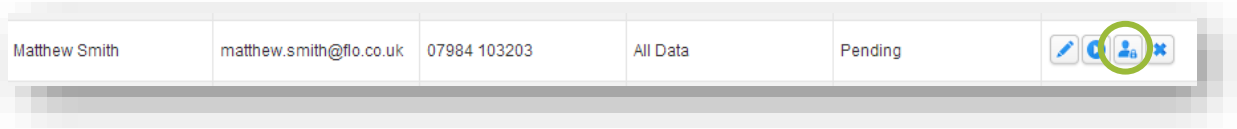
- **All Data**: the user will have access to all business units, including any new business units that get added at a later date.



- **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.

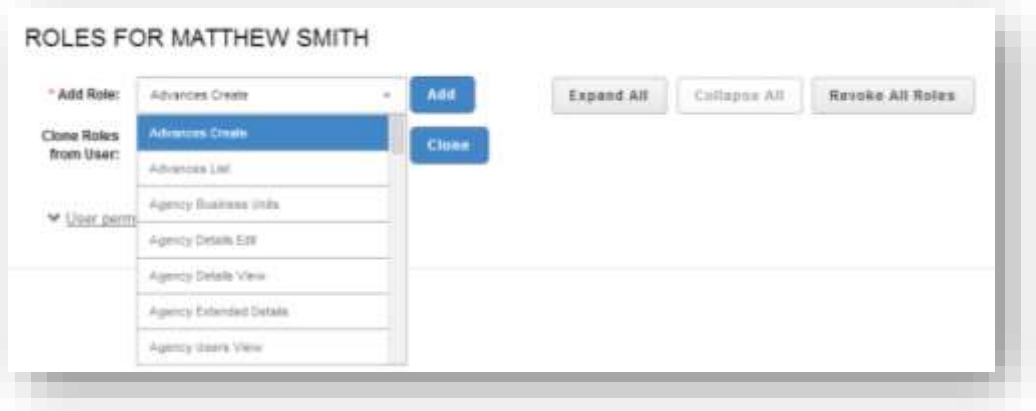


5. In the User view screen, find the user in the list and click on the **User Roles** icon on the right of the row.



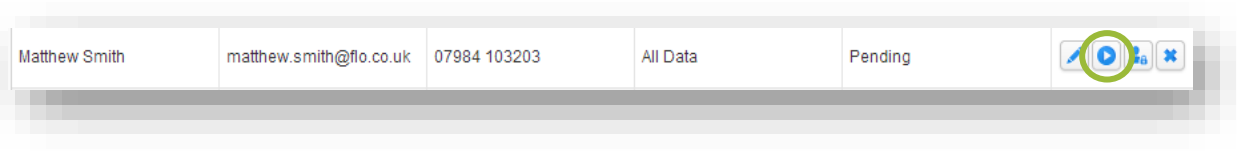
6. There are 2 possible ways to add User Roles to a user.

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.)



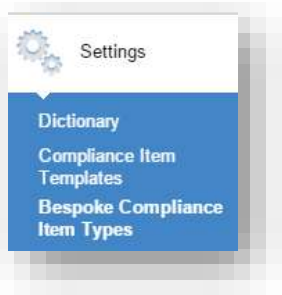
b) Alternatively, it is possible to clone the roles from another user. In the Clone Roles from User box, type the name of the user whose roles you wish to use and click **Clone**.

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.



Bespoke Compliance Items

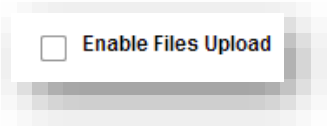
1. On the Menu, go to **Settings** and **Bespoke Compliance Items**.



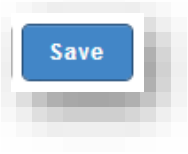
2. At the top of the page, click **Create**.

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.

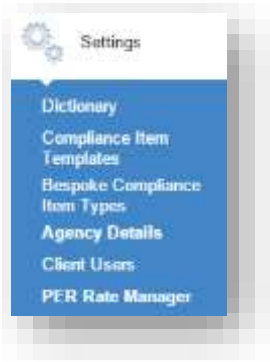


5. Click **Save**.

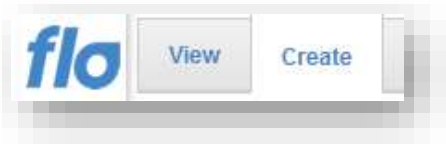


PER Rate Manager

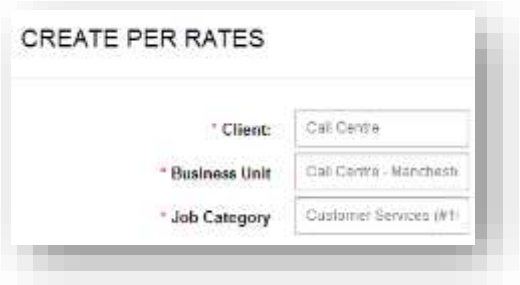
1. On the Menu, go to **Settings** and **PER Rate Manager**.



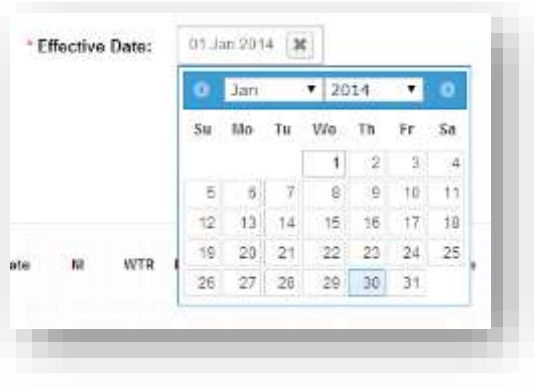
2. At the top of the page, click on **Create**.



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



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.

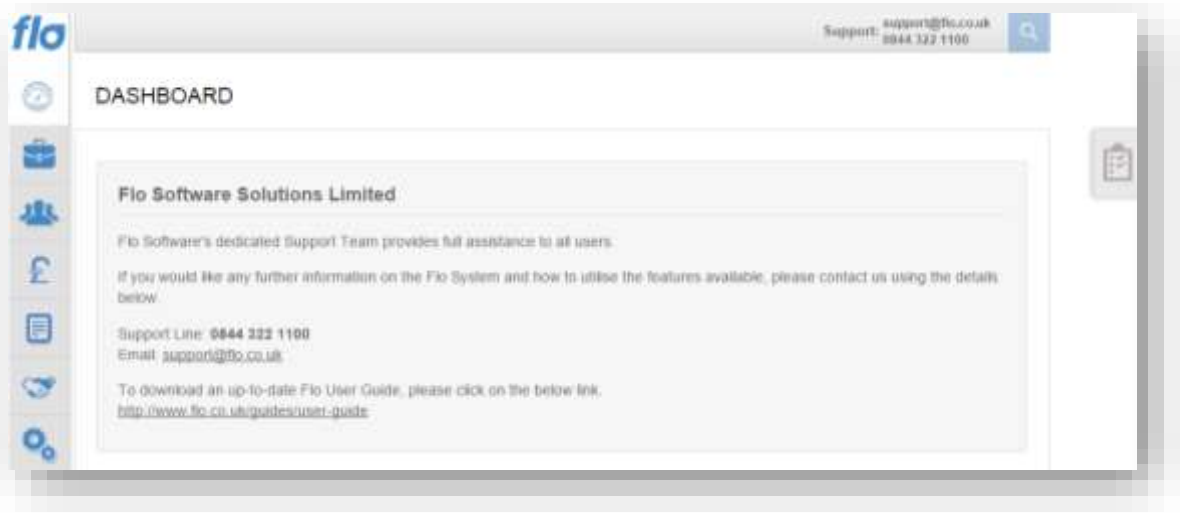
7. Click **Save Rates**.

TASKS

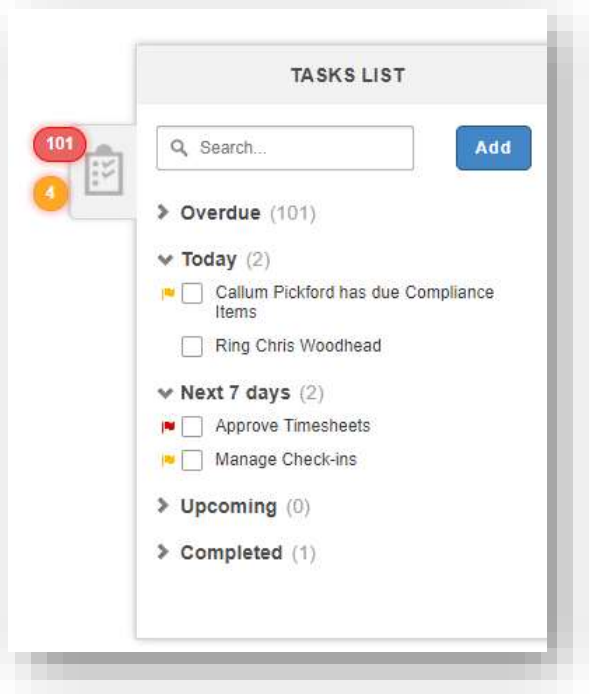
Each user has access to their own Task list within Flo. The Task list is available on the right hand side of the screen, no matter which part of the system is open.

Manually Adding Tasks

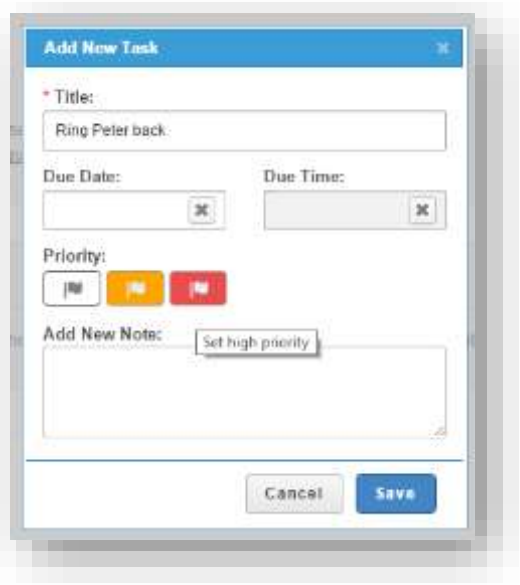
1. To add a Task, open the Task bar by clicking on the icon.



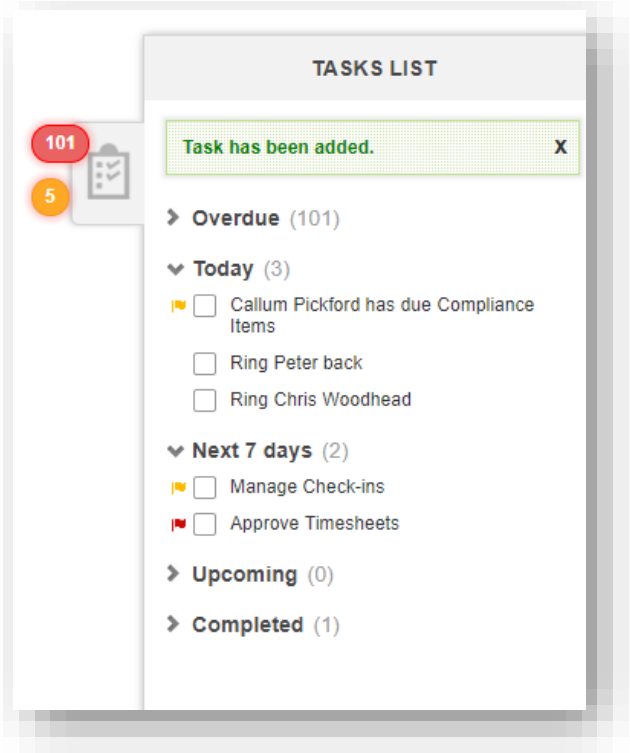
2. Click on **Add**.



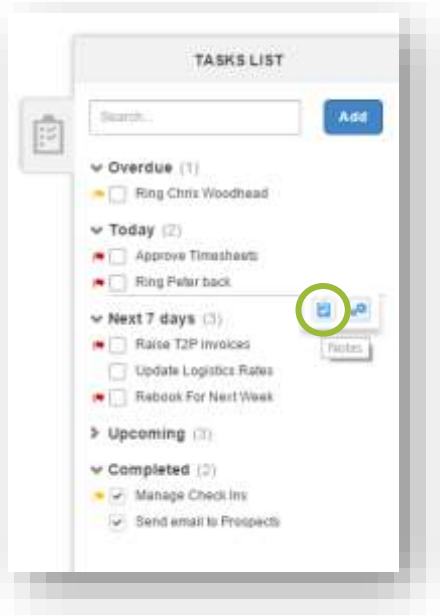
3. Fill out the Title, set the Due Date and the Priority and click Save.



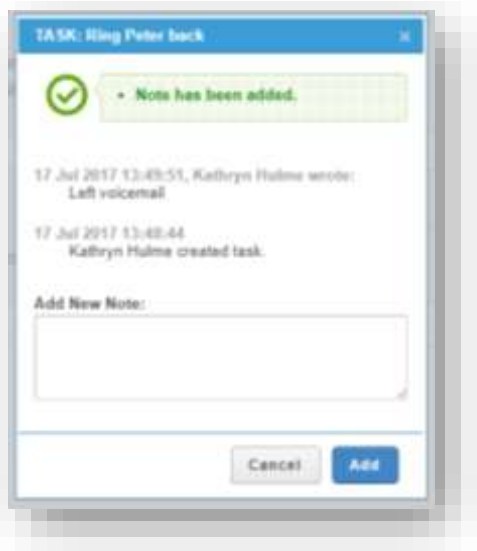
4. The Task will drop into the appropriate section on the Task List.



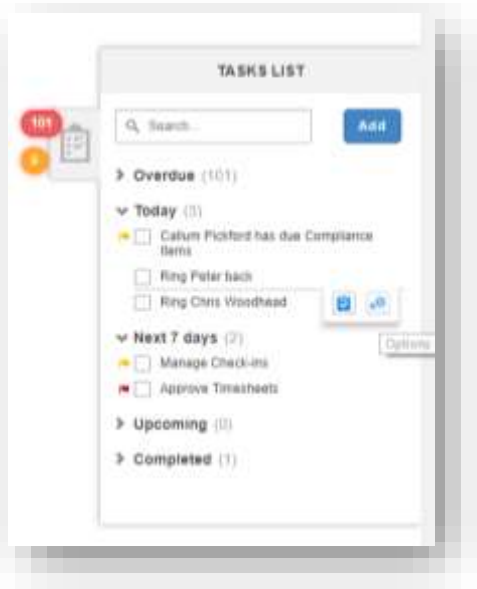
5. To add a Note to the Task, click on **Notes**.



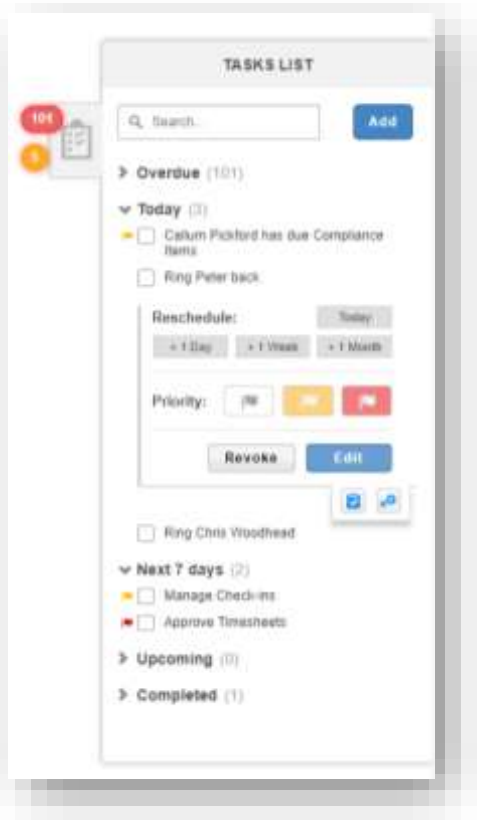
6. Type out the Note and click **Add**.



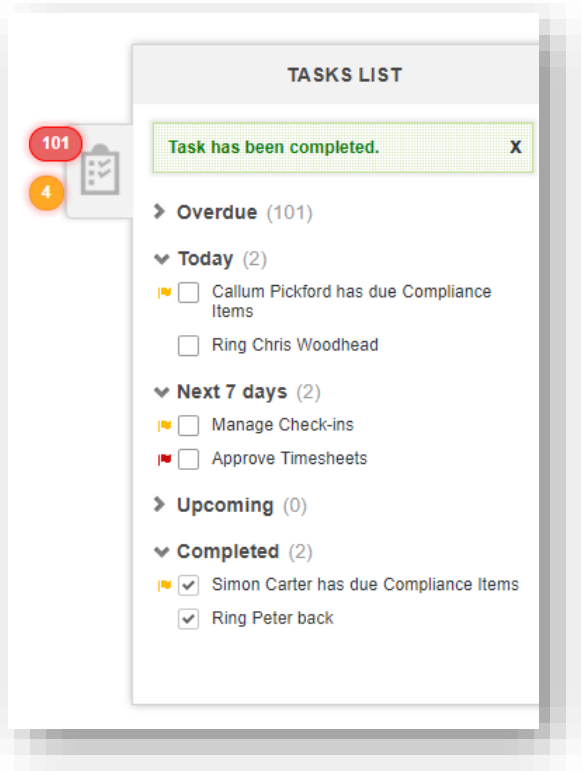
7. To edit the Task, click on **Options**.



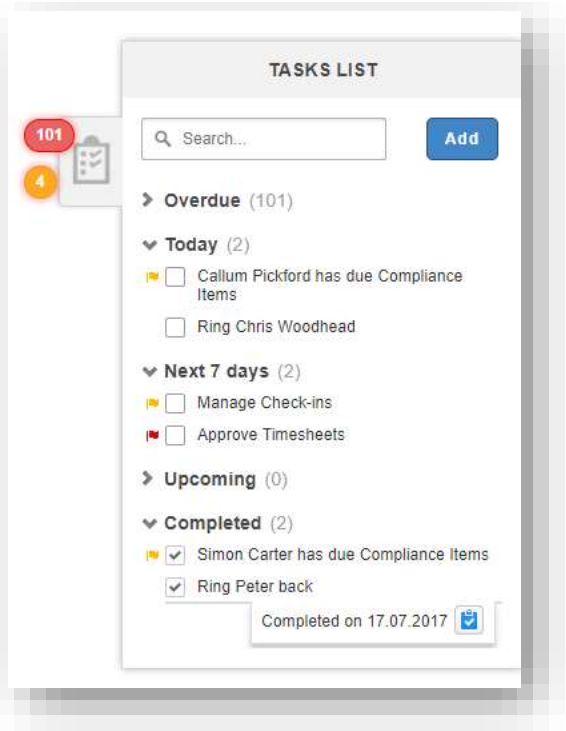
8. Use the options to edit the Task.



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