

Quick Start

# Advanced Tools

Get to know WorkDo!



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V220414

# 1 Must Knows

- 1.1 Tools at Your Disposal
- 1.2 Set Your Tools
- 1.3 Tool Dependency
- 1.4 Know Your Tools

# 2 Common Features

- 2.1 Tool Activation & Tool Roles
- 2.2 User Guides
- 2.3 Flexibility Caters All Workplaces
- 2.4 Everything Begins with Do
- 2.5 Tool Data input
- 2.6 View Records
- 2.7 Edit
- 2.8 Frequently Used Tools
- 2.9 Streamlined Workflow

# 3 Collaboration Tools

- 3 Advanced Tools

# 1. Must Knows

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- 1.1 [Tools at Your Disposal](#)
- 1.2 [Set Your Tools](#)
- 1.3 [Tool Dependency](#)
- 1.4 [Know Your Tools](#)

## 1.1 Tools at Your Disposal

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WorkDo integrates tools that  
effectively improve workflow and productivity!

# 1.1 Tools at Your Disposal



## Workflow Management

Dashboard, Wall,  
Calendar, Workflow



## Approval Sign off

Expenses  
Approvals



## HR Management

HR  
Attendance  
Check-In  
Leave, Leave Pro  
Overtime, Shift  
Payroll



## CRM

CRM  
Phonebook



## Digital Management

Conf. Rm,  
Cashbook  
We Buy, IOU

## 1.2 Set Your Tools

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Use WorkDo across different devices.

App - Simple and intuitive to use.

Web - Easy setting & data management.

## 1.2 Set Your Tools : Preferred Setting Device

Advanced Tool	Web	App	Preferred Device
HR, Payroll	●		Web - Supports all functions and is used for initial setup.
Attendance		●	App - Essential for initial setup. A Tablet is required for a facial recognition clock in/out.
Check In, Leave		●	App - Can be setup using the app alone.
Leave Pro	●		Web - Supports all functions and is used for initial setup.
Shift, Timesheet	●		Web - Supports all functions and is used for initial setup.
Overtime		●	App - Can be setup using the app alone.
Expenses Approvals		●	App - Can be setup using the app alone.
Conf. Rm	●		Web - Supports all functions and is used for initial setup.
CRM, Cashbook		●	App - Can be setup using the app alone.
Phonebook, We Buy		●	App - Can be setup using the app alone.

## 1.3 Tool Dependency

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A dedicated tool box for your workplace, groups, and buddies.

Different tools for different settings and purposes.

Tool dependency is crucial to achieving semi-auto processing.



## 1.3 Tool Dependency

Advanced Tool	Workplace	Groups	Buddies	Dependency
HR	●			
Payroll	●			HR Dependent
Attendance, Check In	●			HR Dependent
Leave, Leave Pro	●			HR Dependent
Shift	●			HR Dependent
Overtime	●			HR Dependent
Timesheet	●			HR Dependent
Approvals, Expenses	●			HR Dependent
CRM, Conf. Rm	●			
Phonebook, Cashbook	●	●	●	
We Buy, IOU	●	●		

## 1.4 Know Your Tools

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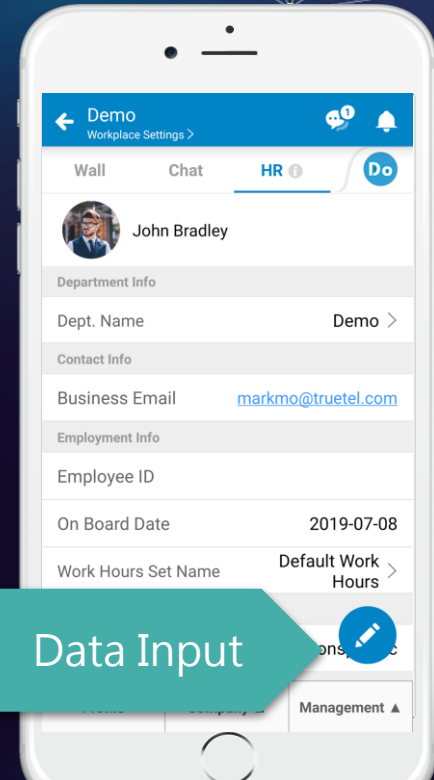
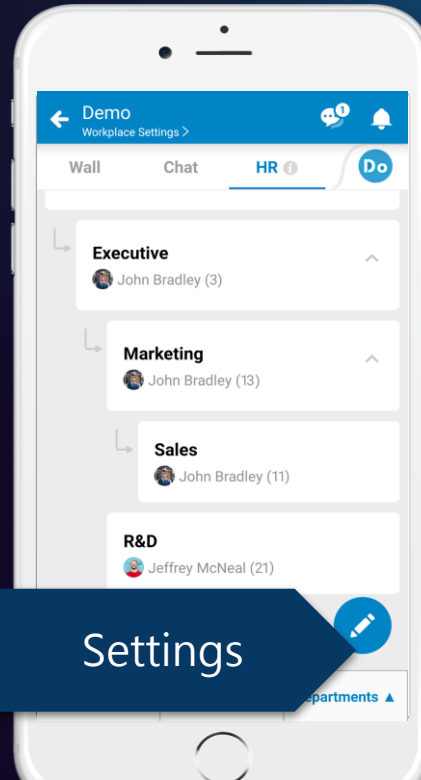
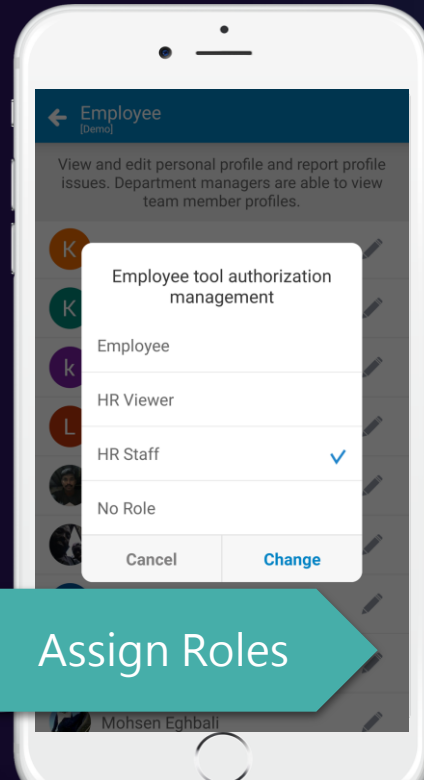
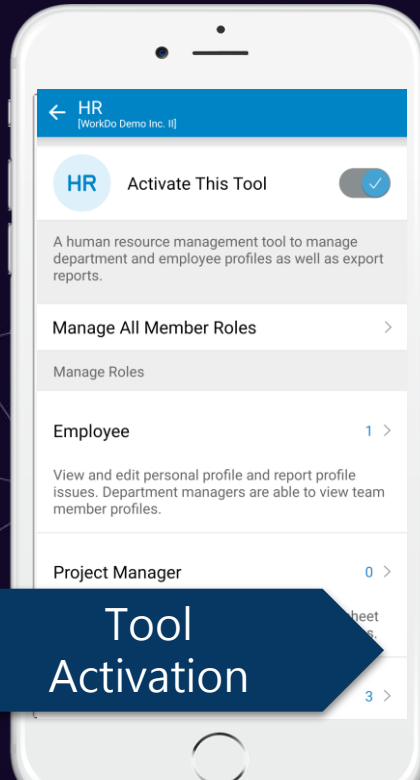
Activate the tools.

Set tool roles.

Set tool settings.

Input data.

# 1.4 Know Your Tools



## 2. Common Features

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- 2.1 [Tool Activation & Tool Roles](#)
- 2.2 [User Guides](#)
- 2.3 [Flexibility Caters All Workplaces](#)
- 2.4 [Everything Begins with Do](#)
- 2.5 [Tool Data Input](#)
- 2.6 [View Records](#)
- 2.7 [Edit](#)
- 2.8 [Frequently Used Tools](#)
- 2.9 [Streamlined Workflow](#)

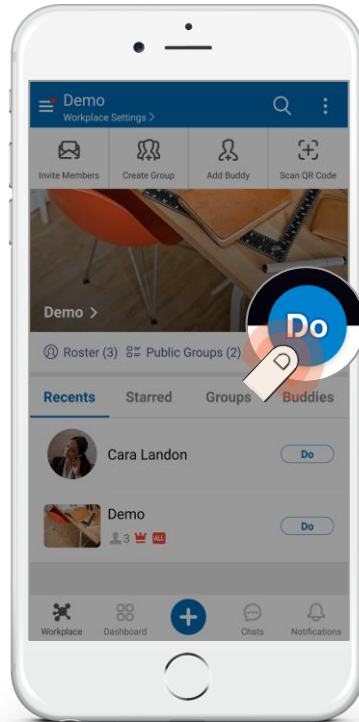
## 2.1 Tool Activation & Tool Roles

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Assign tool roles for access control.

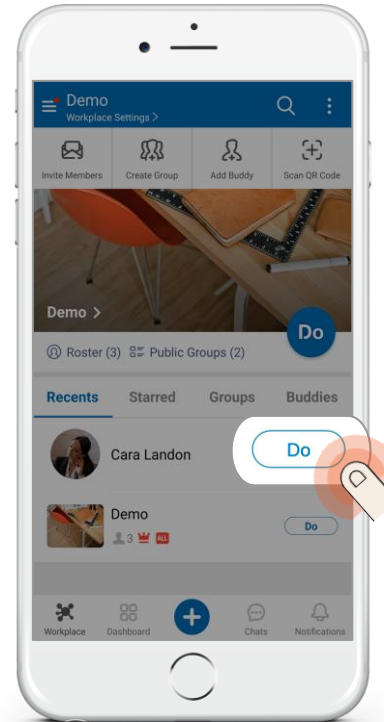
Compartmentalize information without hindering productivity.

## 2.1 Tool Activation & Tool Roles



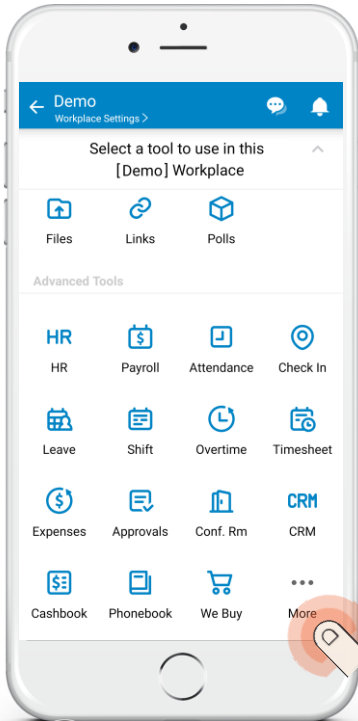
01<sub>a</sub> Workplace > Do

There is a tool box for workplace, groups, buddies

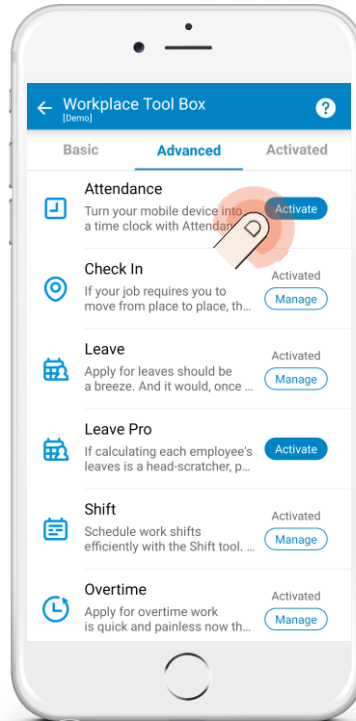


01<sub>b</sub> Workplace > Groups /  
Buddies > Do

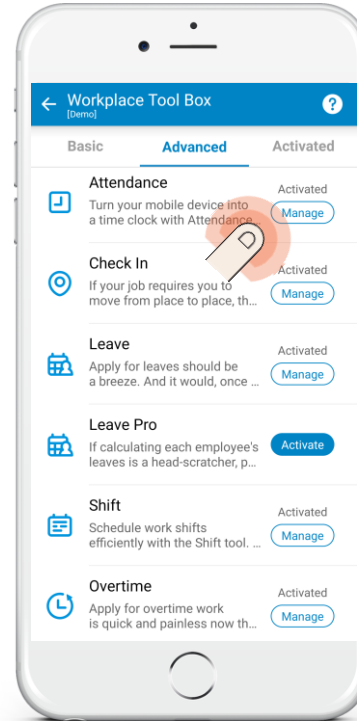
## 2.1 Tool Activation & Tool Roles



02 Workplace Toolbox

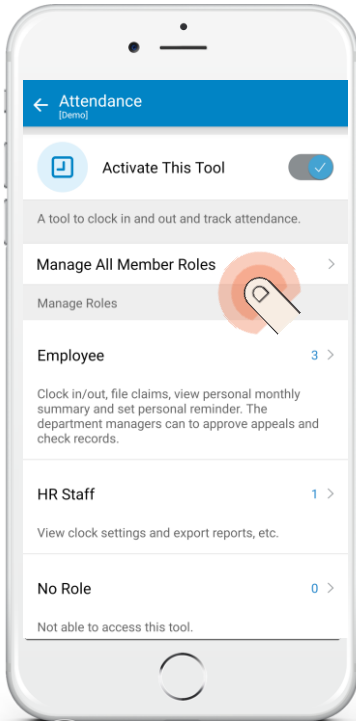


03 Advanced > Activate

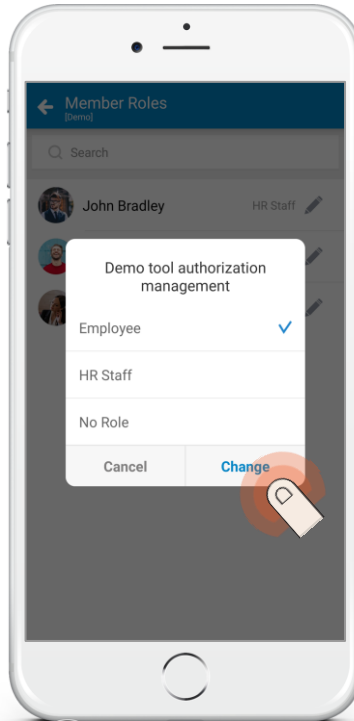


04 Manage

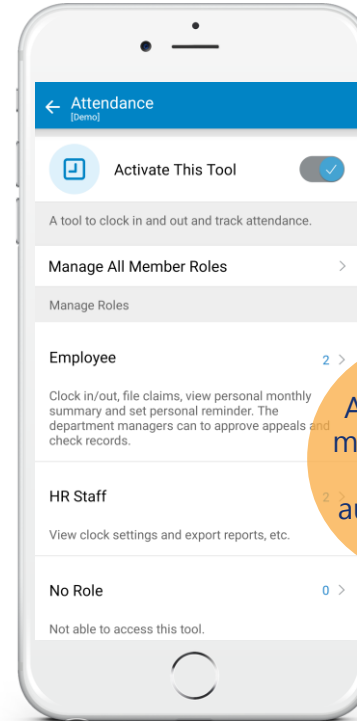
## 2.1 Tool Activation & Tool Roles



**05** Manage All Member Roles



**06** Select a New Role > Change



**07** Done!

A list view of members with each authorization

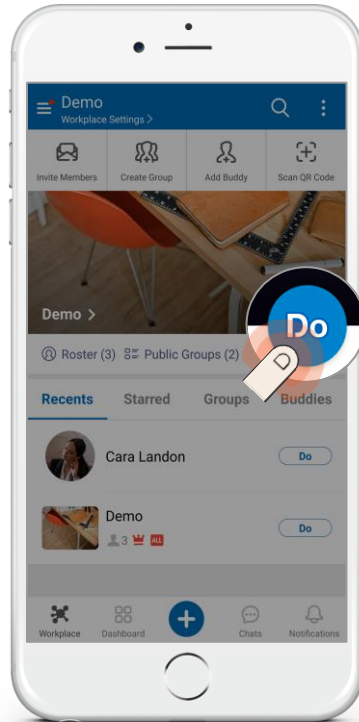


## 2.2 User Guides

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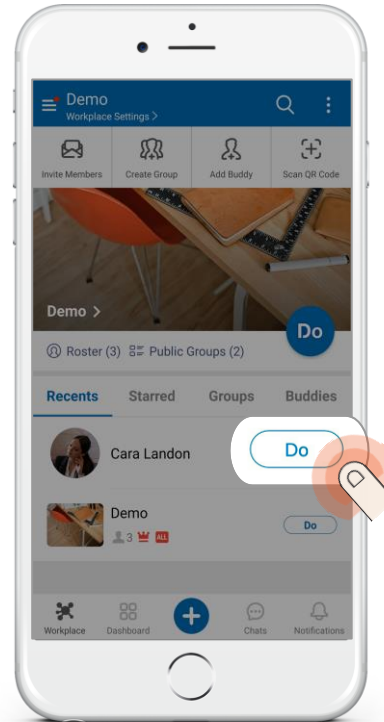
The User Guides Contains Everything You Need to Know!

## 2.2 User Guide Download



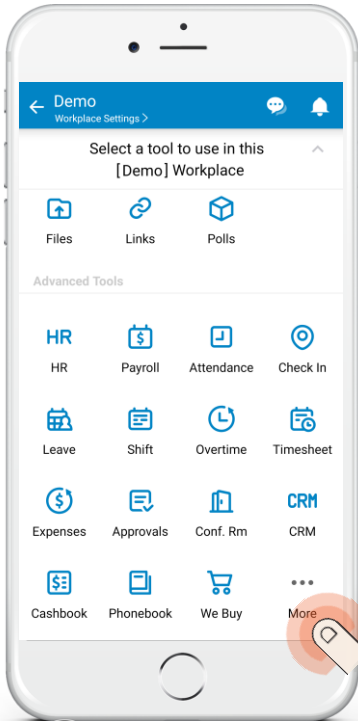
01<sub>a</sub> Workplace > Do

Same rule  
applies to the  
workplace,  
groups &  
buddies

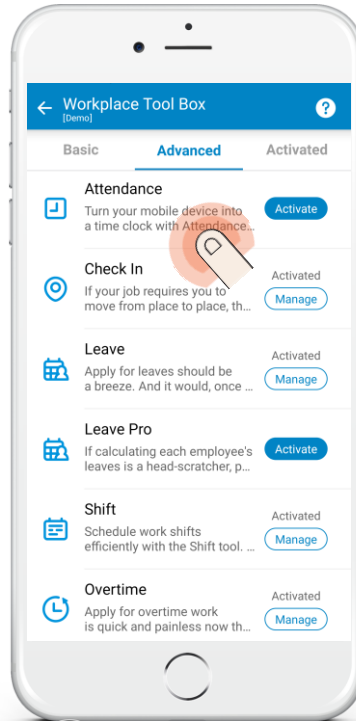


01<sub>b</sub> Workplace > Groups /  
Buddies > Do

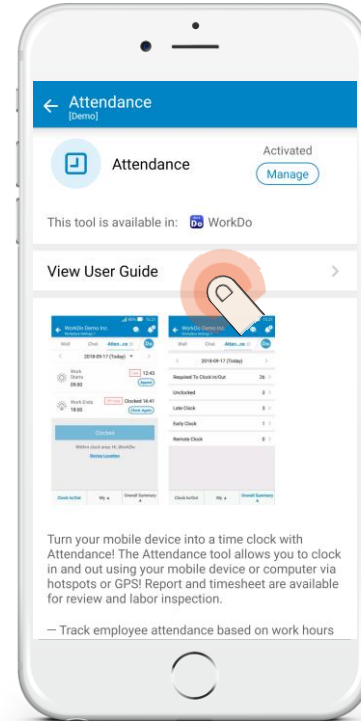
## 2.2 User Guide Download



02 Workplace Toolbox



03 Select a Tool

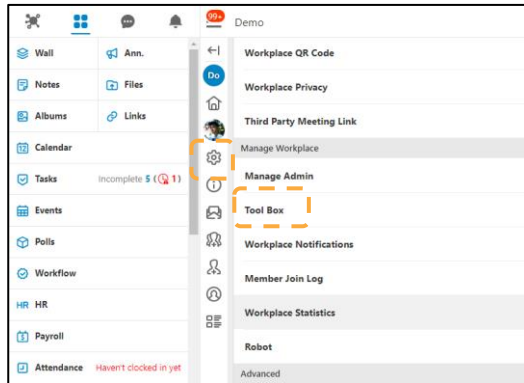


04 View User Guide

## 2.2 User Guide Download - Web

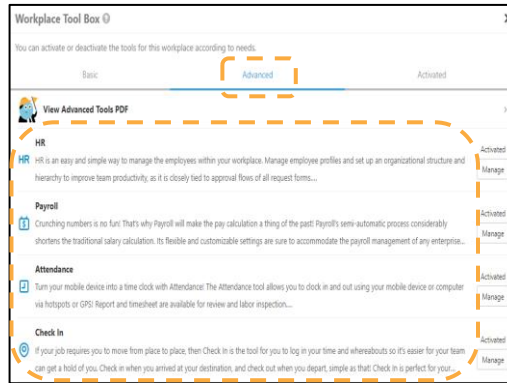
# 01

Click Workplace Settings > Tool Box



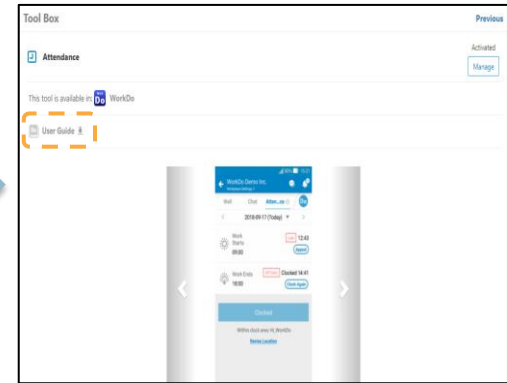
# 02

Click Advanced Tab > Select a Tool



# 03

Click User Guide to Begin Download



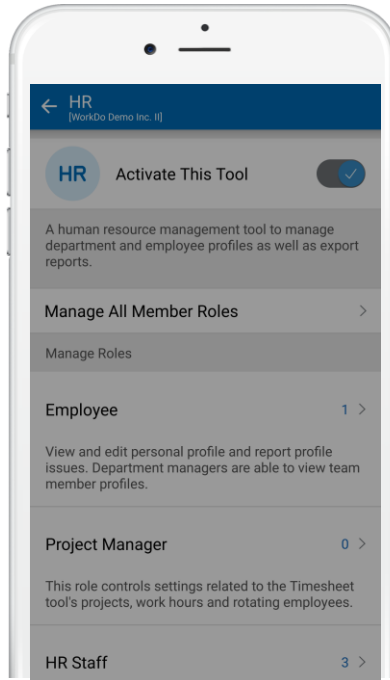
## 2.3 Flexibility Caters All Workplaces

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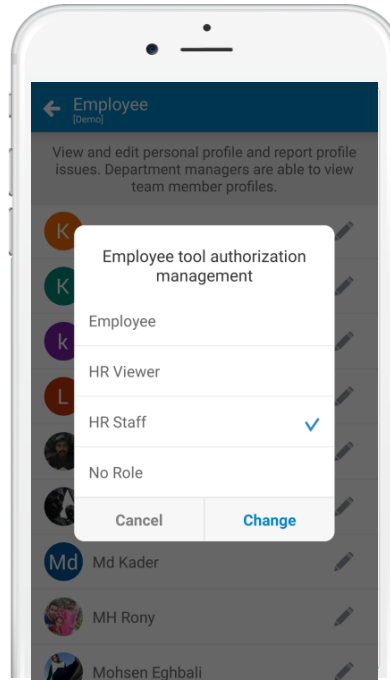
Customize the settings to reflect  
how your workplace actually functions!

## 2.3 Flexibility Caters All Workplaces

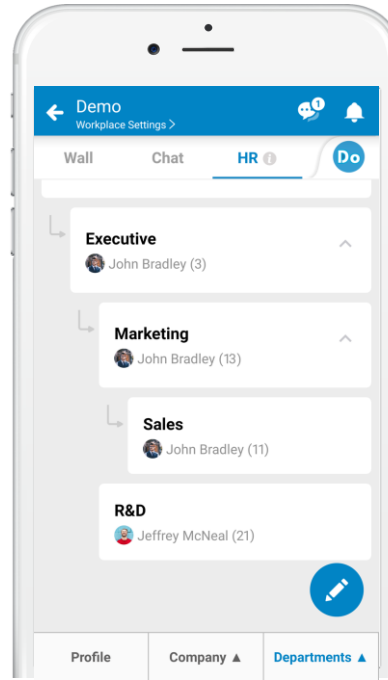
Tool activation



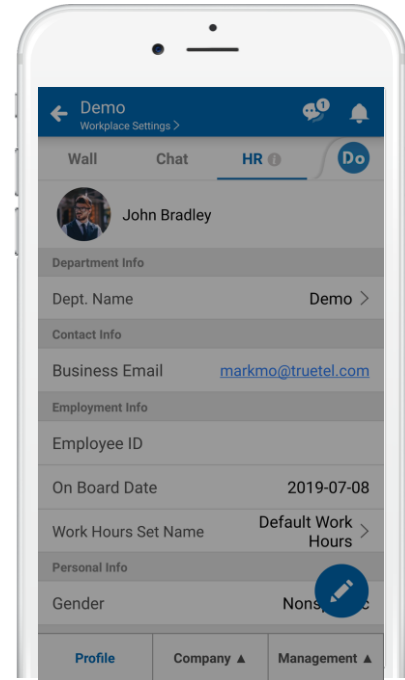
Set tool roles



Basic settings



Data input



## 2.4 Everything Begins with Do

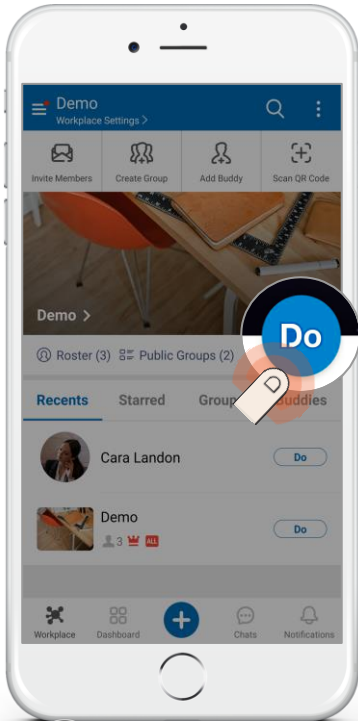
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Workplace, Groups, Buddies

Different tools at each level

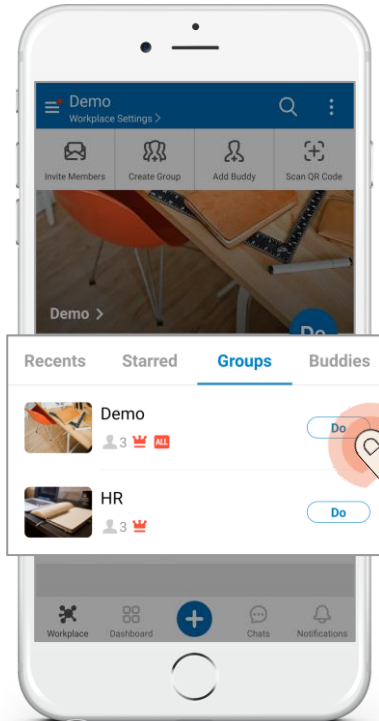
Just click Do!

## 2.4 Everything Begins with Do



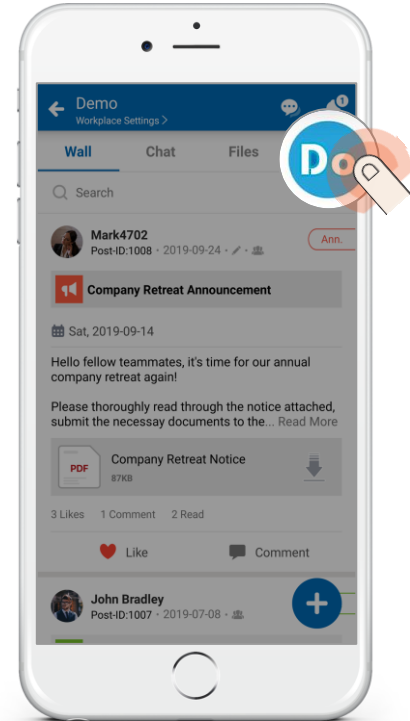
01<sub>a</sub> Workplace > Do

Or



01<sub>b</sub> Workplace > Groups,  
Buddies > Do

Or

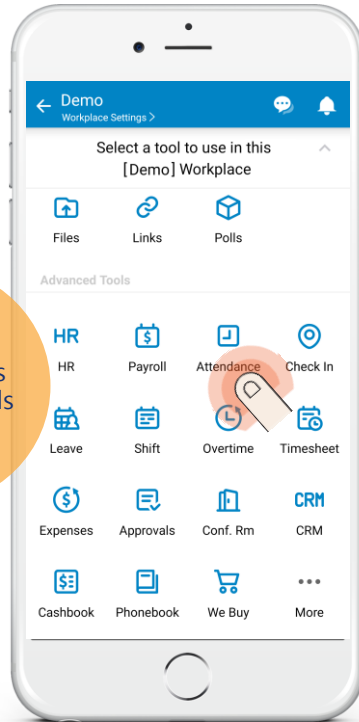


01<sub>c</sub> Workplace > Groups,  
Buddies > Do

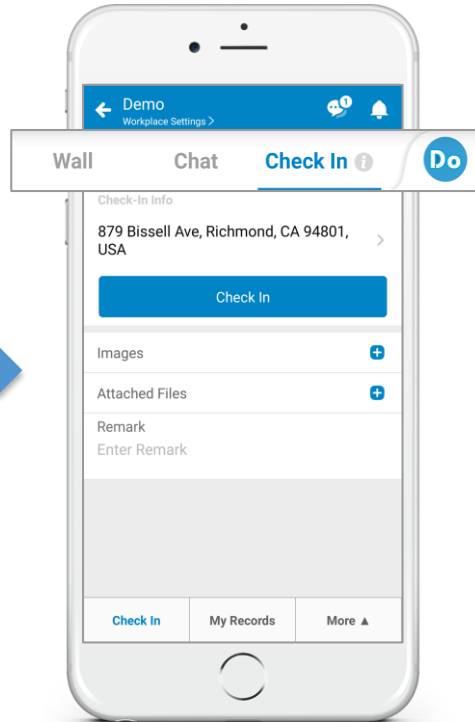


## 2.4 Everything Begins with Do

Only displays  
activated tools



02 Tool select



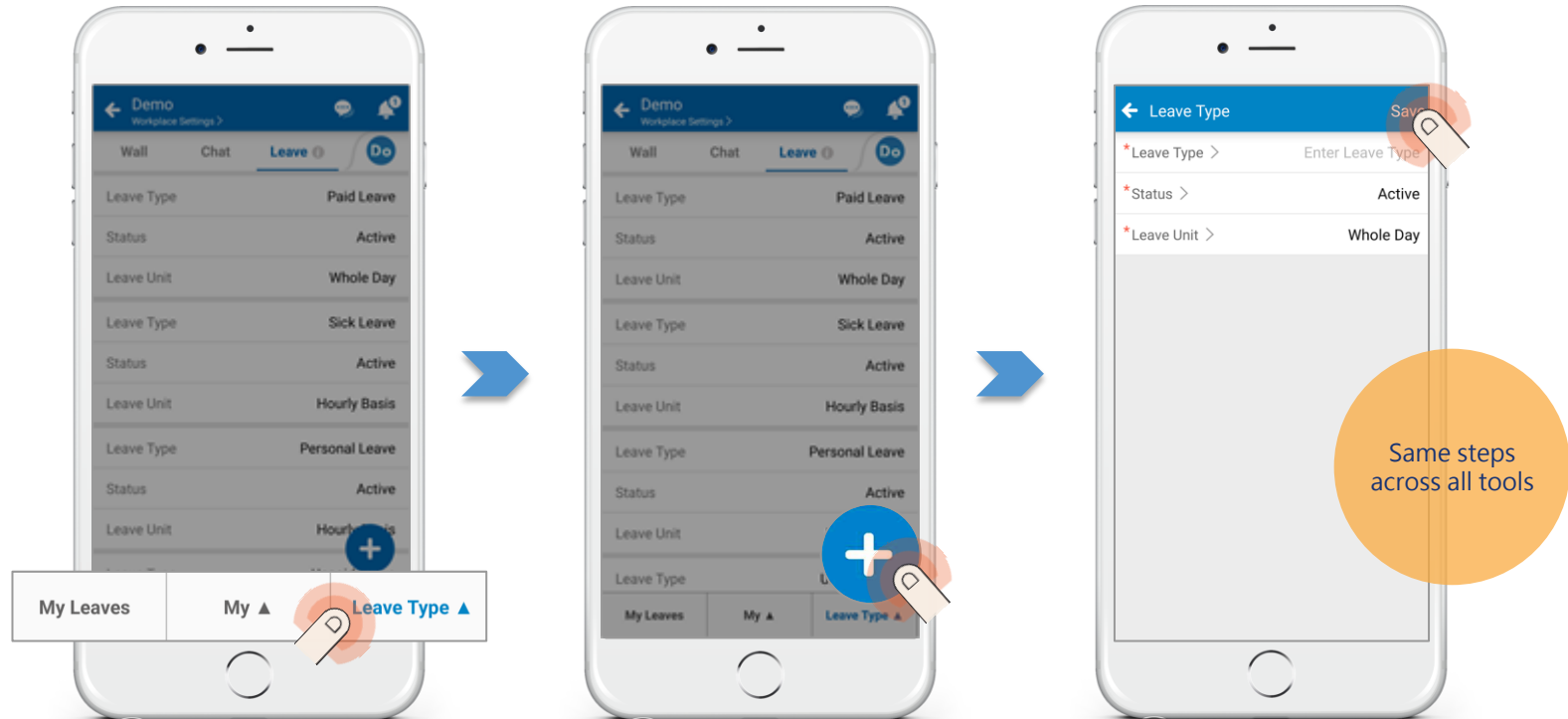
03 Tool tab is displayed  
at the top

## 2.5 Tool Data Input

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Select the desired tool and function  
Use + to create, it is that simple!

## 2.5 Tool Data Input : e.g. Leave Type



01 Function Select

02 Click +

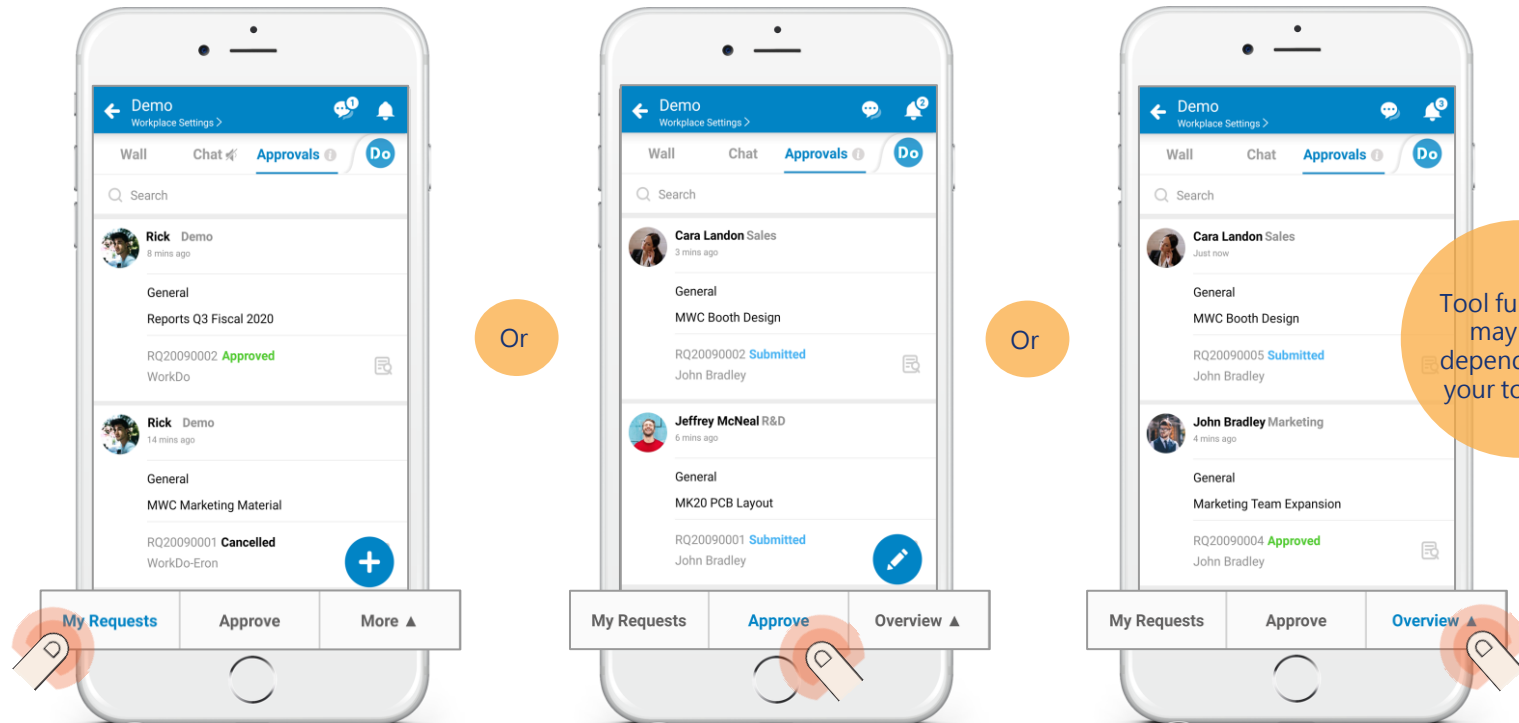
03 Data input > Save

## 2.6 View Records

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Same simple record viewing steps across all tools!

## 2.6 View Records : e.g. Approvals

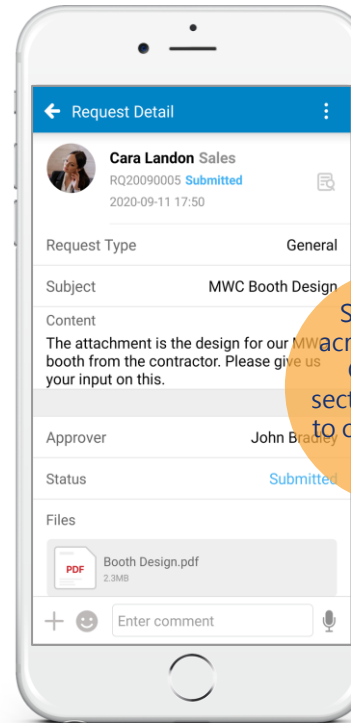
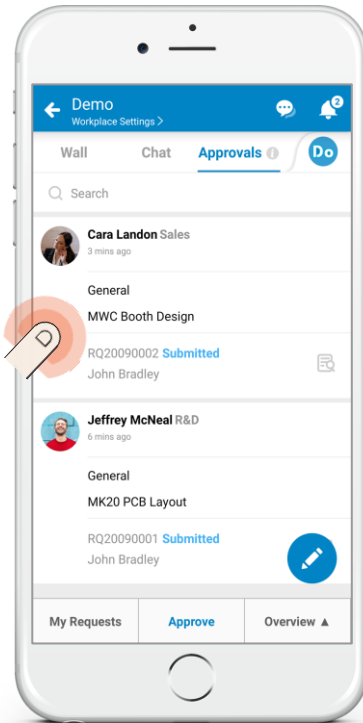


01<sub>a</sub> My Requests

01<sub>b</sub> Approval

01<sub>c</sub> Processed

## 2.6 View Records : e.g. Approvals



Same steps across all tools. Comment section available to communicate details.

02 Select a record

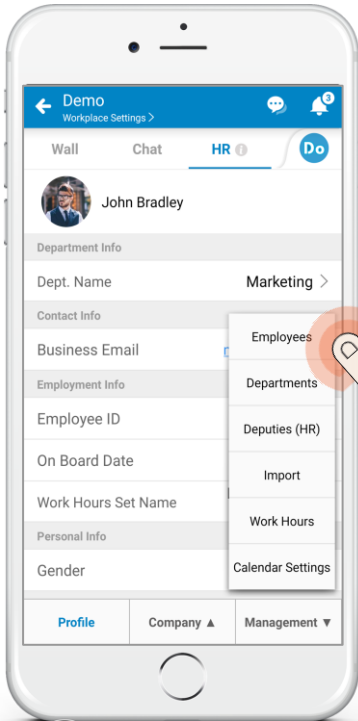
03 View record detail

## 2.7 Edit

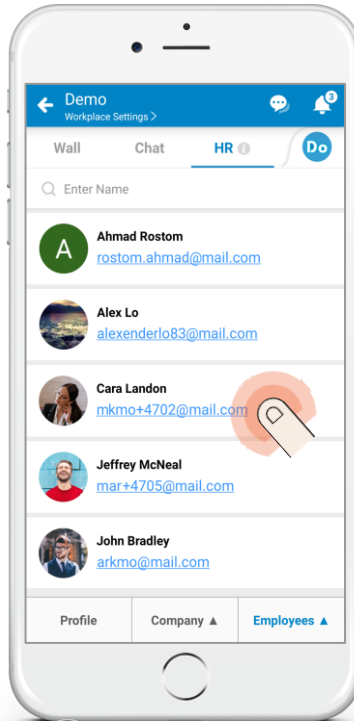
---

Made a mistake? Worry not!

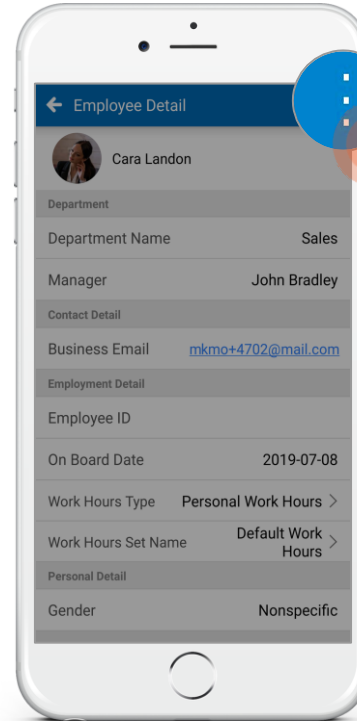
## 2.7 Edit : e.g. HR



01 Management > Employees



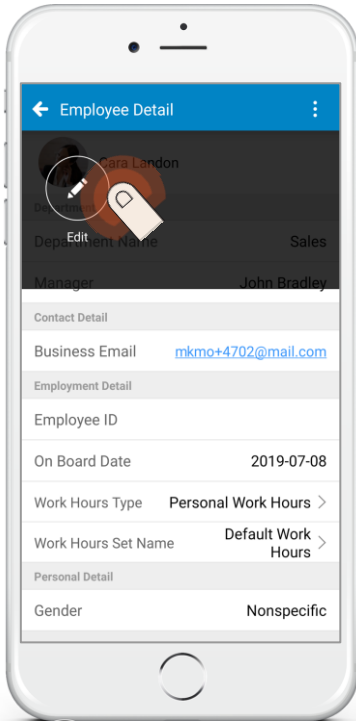
02 Select an employee



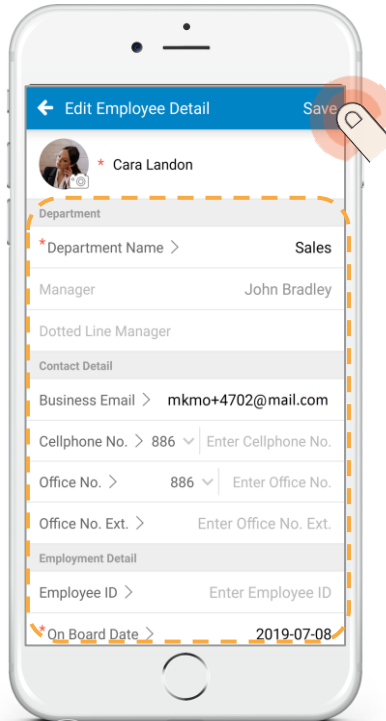
03 Function button



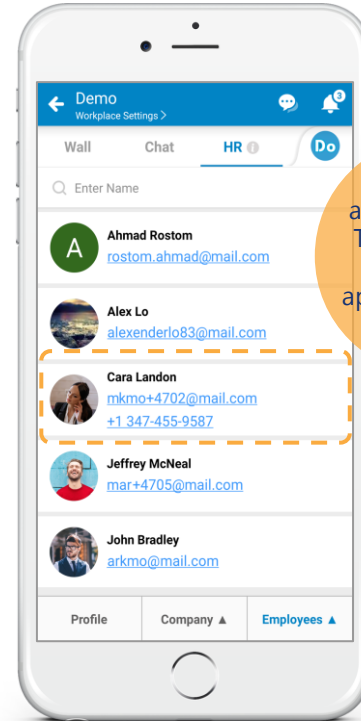
## 2.7 Edit : e.g. HR



04 Edit



05 Info edit > Save



06 Info edited

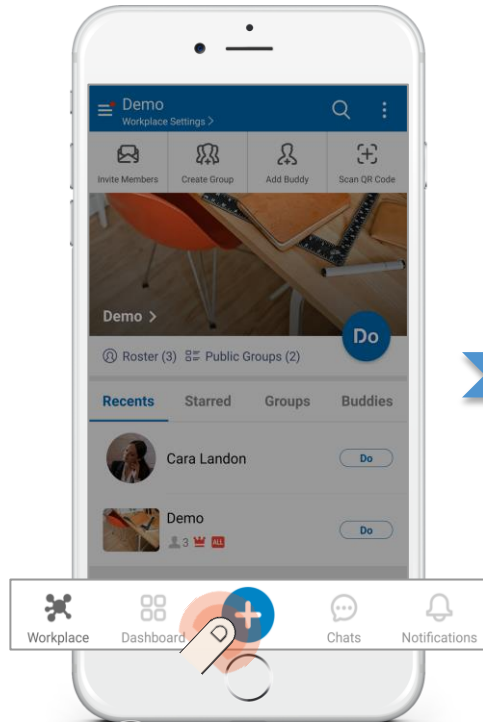
Same steps across all tools. Those that are depending approval cannot be edited.

## 2.8 Frequently Used Tools

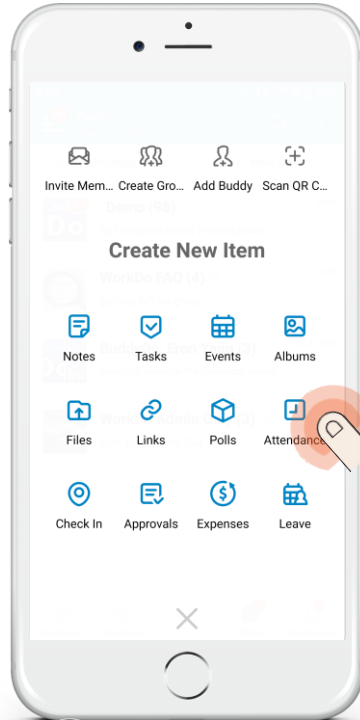
---

Quickly access tools you frequently use with one button!

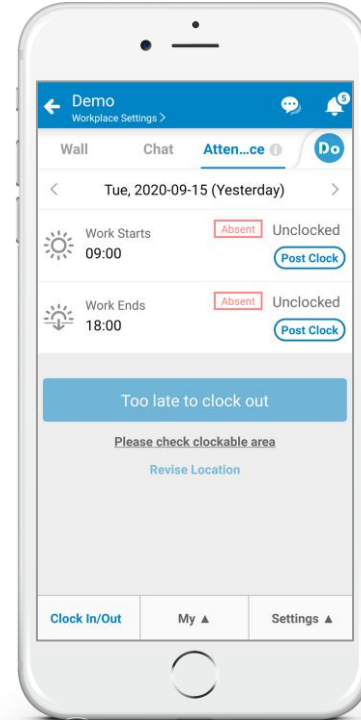
## 2.8 Quicker Tool Access with +



01 + Create



02 Select a tool from your frequently used tool list



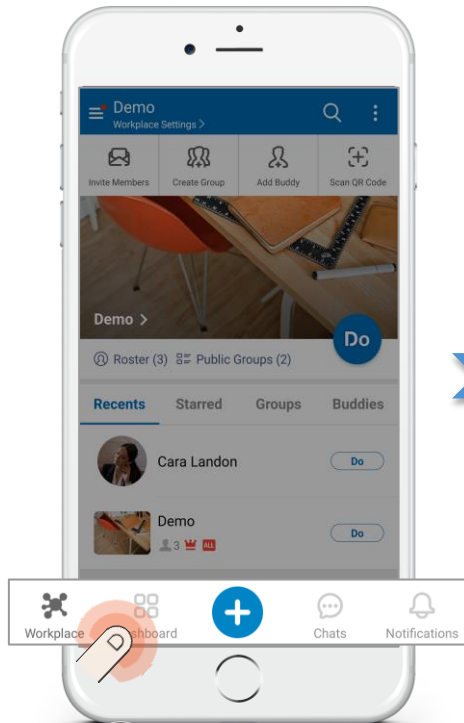
03 Quick tool access

## 2.9 Streamlined Workflow

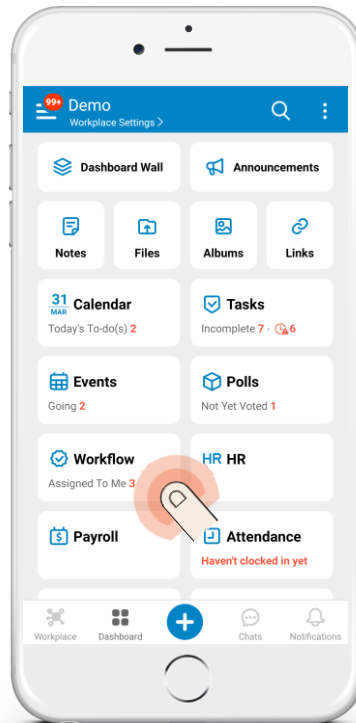
---

Attendance, Overtime, Leave, Expenses, Approvals  
Make use of Workflow in the dashboard  
and save yourself valuable time!

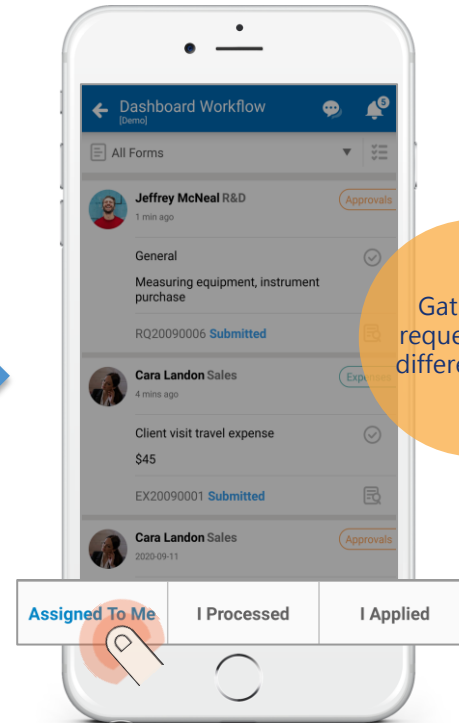
## 2.9 Streamlined Workflow



01 Dashboard



02 Workflow

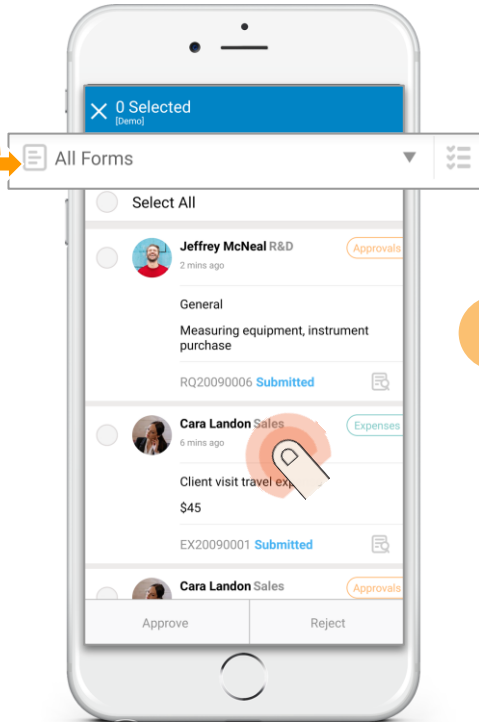


03 Assigned to Me

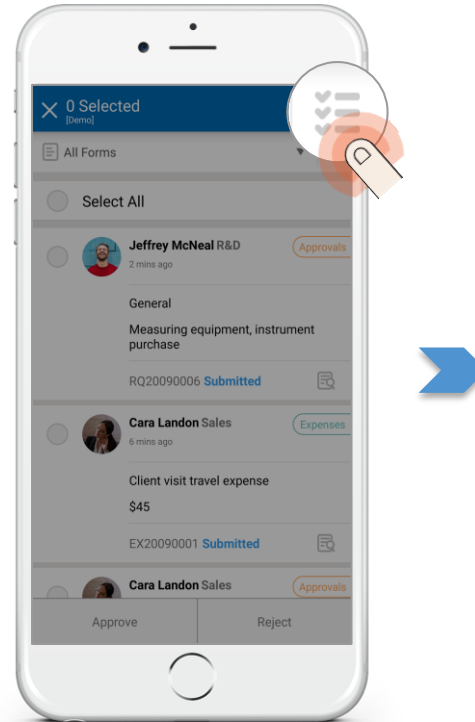
Gathers all requests from different tools.

## 2.9 Streamlined Workflow

Filter the types of requests



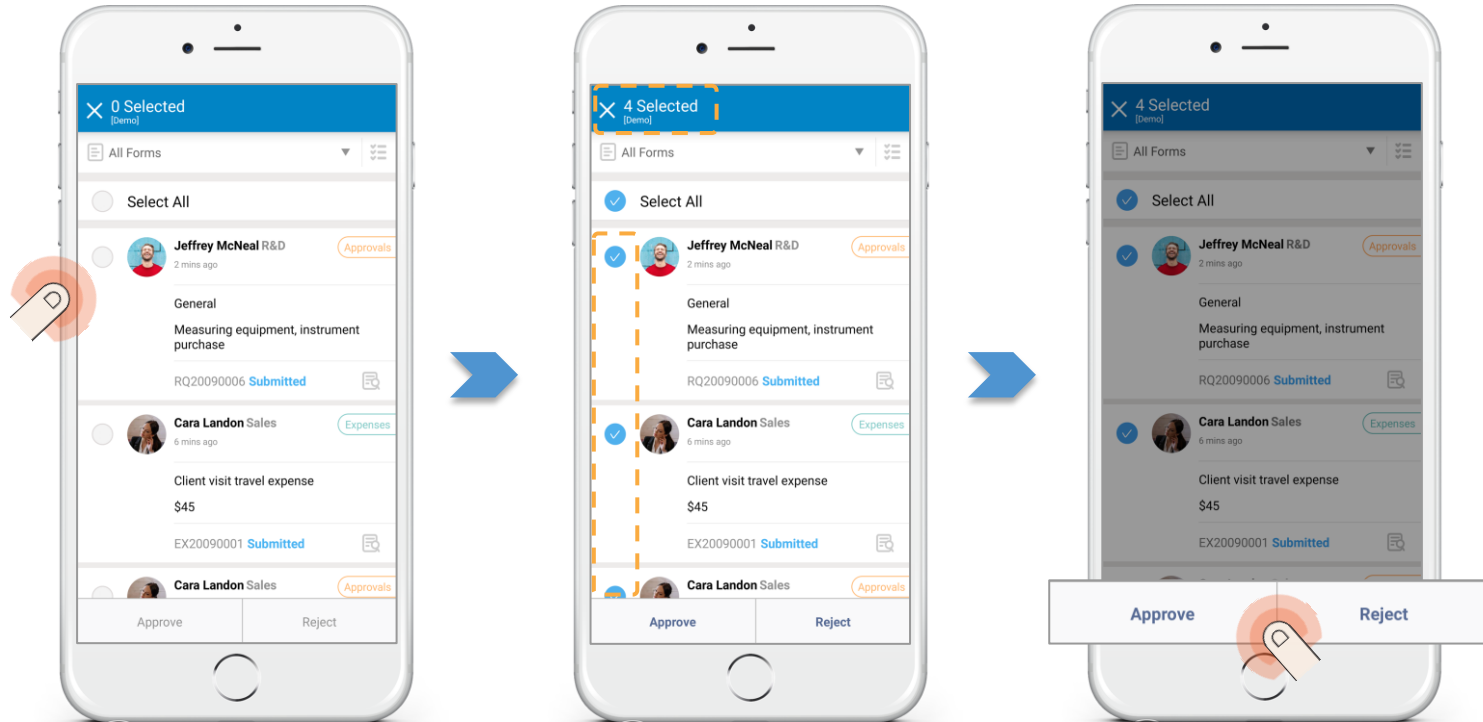
Or



04a Single request sign off

04b Batch process

## 2.9 Streamlined Workflow : Batch Process

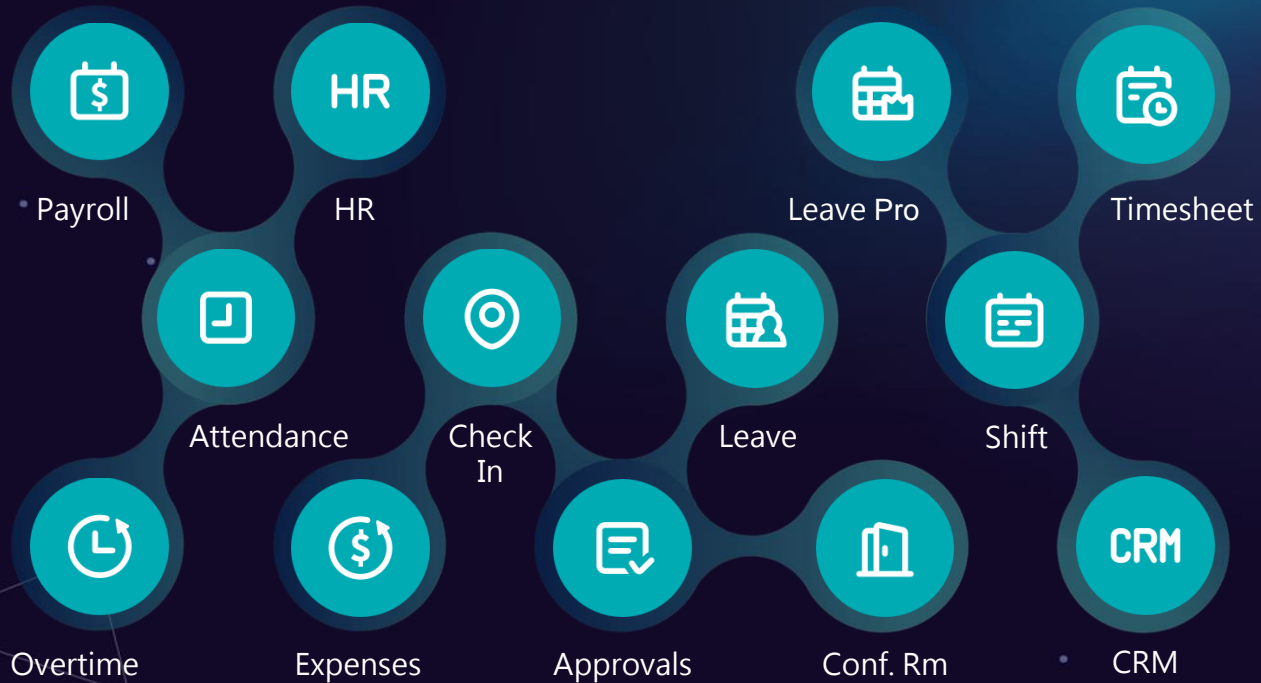


**05** Select requests

**06** Marked by blue checks

**07** Approve or reject

# 3 Advanced Tools





## 3.1 HR

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The impost integral part of all the tools!



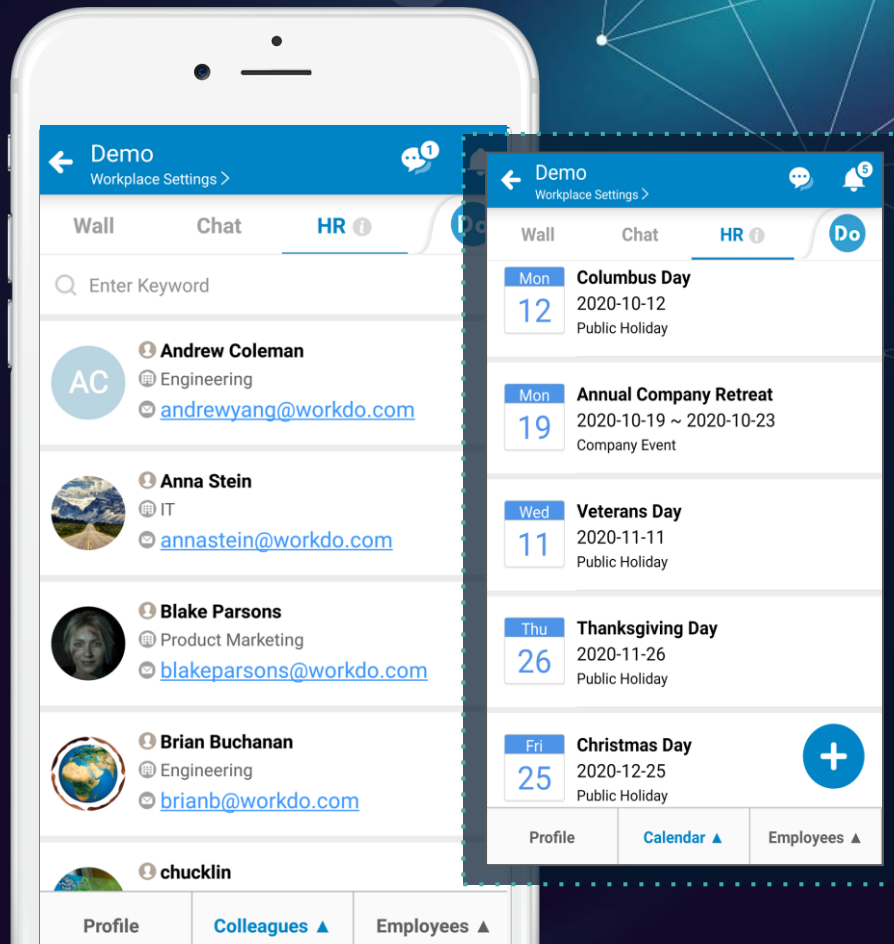
Download  
User Guide

[Back to Tool List](#)

# HR

Set organizational structure & hierarchy  
Easily manage your team!

- Linked to Payroll, Attendance, Leave, Leave Pro, Overtime, Expenses & Approvals.
- Set your organizational structure and internal directory.
- Maintains the employee profiles.
- Set work hours and clock-in/out times.
- Create your company calendar.
- Set deputies, approvers and dotted-line managers.

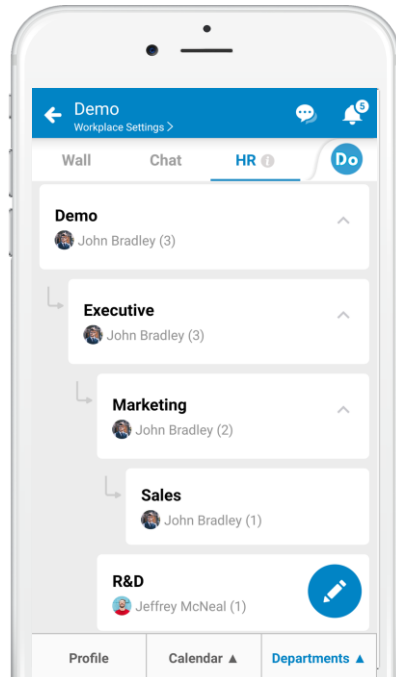


## 3.1 HR : The Pillar of WorkDo

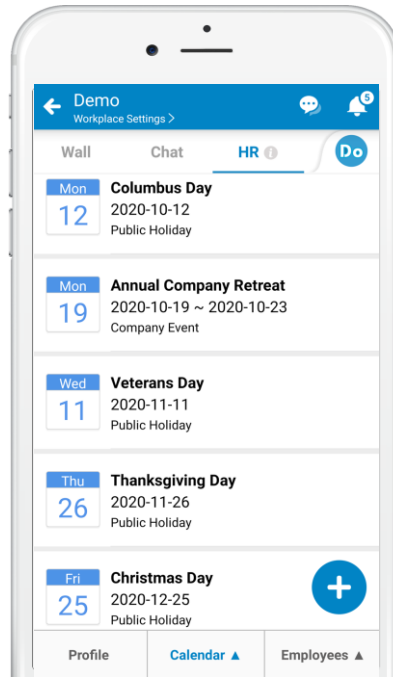
Function	Payroll	Attendance	Check In	Leave	Leave Pro	Shift	Overtime	Timesheet	Expenses	Approvals
System Settings		●		●	●	●	●		●	●
Work Hours		●			●	●	●			
Departments		●	●	●	●	●	●		●	●
Employment Types					●		●			
HR Calendar		●			●		●			
Employee Profiles	●	●	●	●	●	●	●	●	●	●
Deputy Assignment				●	●					
Approver Assignment									●	●
Shift Manager Assignment		●				●				
Projects								●		

## 3.1 Features ( Available functions are dependent on member tool role )

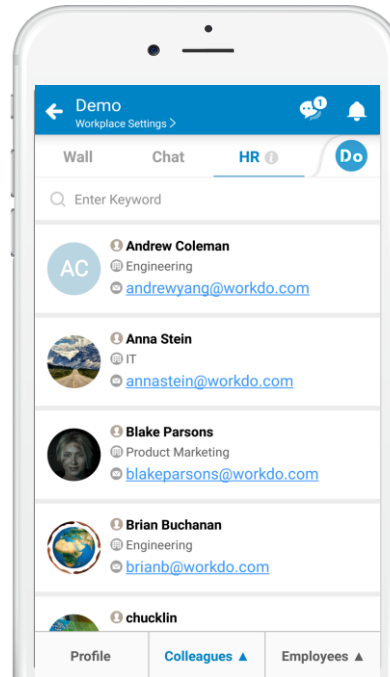
### Department Management



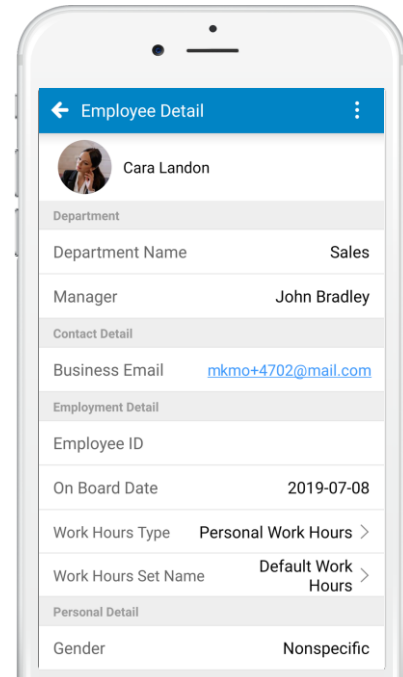
### Company Calendar



### Internal Directory



### Profile Update



## 3.2 Payroll

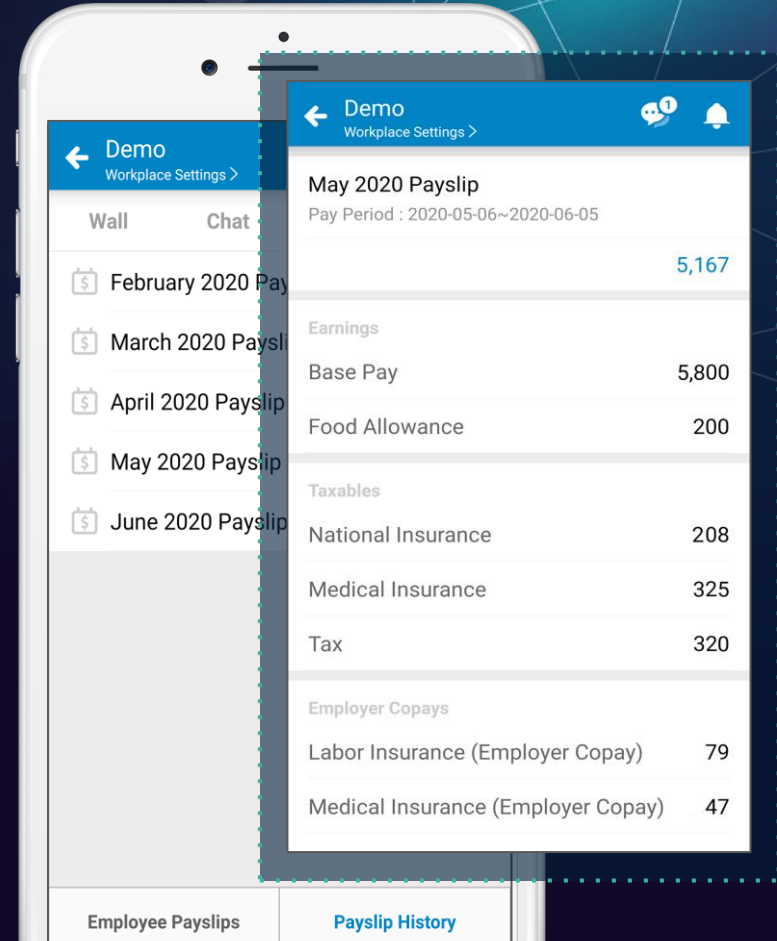
---

Customizable to fit all businesses!  
Minimize effort spent on payroll management.  
Send payslips with a click of a button.

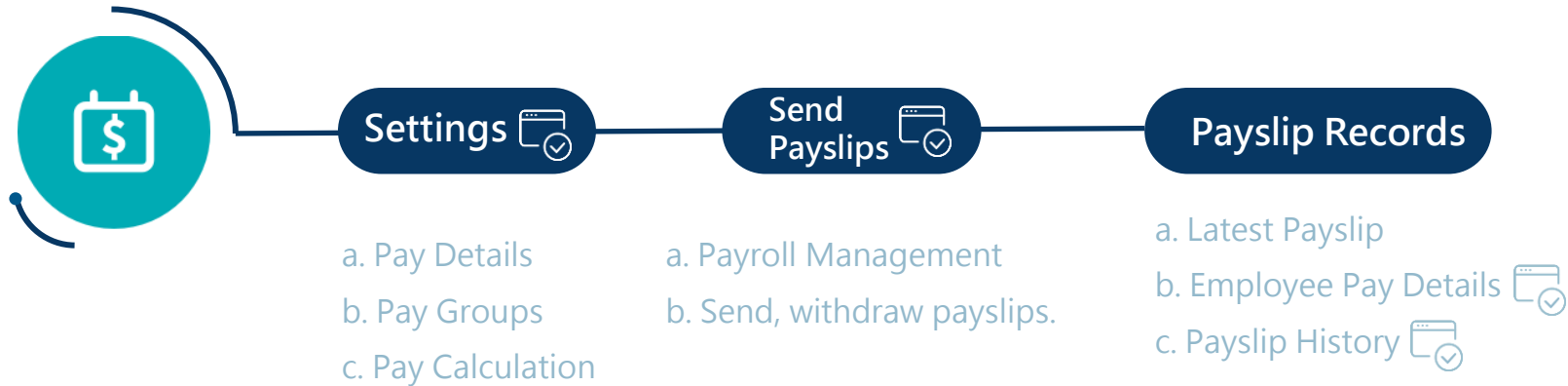
# Payroll

A payroll management system that satisfies all businesses!

- Customize equations for salary calculations.
- Create reference tables that abide by local labor laws.
- Expand and customize fields as required.
- Set pay groups, items and details for calculations.
- Linked with Leave Pro and Overtime for compensation pay.
- Automated salary calculations based on set equations.
- Use past salary equations when no changes are needed.
- Send employee payslips with a click of a button.




## 3.2 Payroll : Functions & Procedures



Web version only

## 3.2 Features ( Available functions are dependent on member tool role )

### Settings - Web

 Payroll HR Staff

Payslip

- Latest Payslip
- Payslip History

Payroll Management

- Pay Calculation
- Pay Details
- EMPL Pay Details
- Pay Groups
- Expand EMPL Pay Details
- Reference Tables
- Leave Requests
- Overtime Requests

### Payslip History

← Demo  
Workplace Settings >

Wall Chat Payroll ⓘ Do

February 2020 Payslip >

March 2020 Payslip >

April 2020 Payslip >

May 2020 Payslip >

June 2020 Payslip >

Employee Payslips Payslip History

### Password

← Demo  
Workplace Settings >

Wall Chat Payroll ⓘ Do

Password

For privacy reasons, please enter your login password before viewing your payslip.

.....

Confirm

Employee Payslips Payslip History

### Payslip Details

← Demo  
Workplace Settings >

Wall Chat Payroll ⓘ Do

May 2020 Payslip

Pay Period : 2020-05-06~2020-06-05

5,167

Earnings

Base Pay 5,800

Food Allowance 200

Taxables

National Insurance 208

Medical Insurance 325

Tax 320

Employer Copays

Labor Insurance (Employer Copay) 79

Medical Insurance (Employer Copay) 47



## 3.3 Attendance

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Wi-Fi, GPS clock-in/out using PC or smartphone.

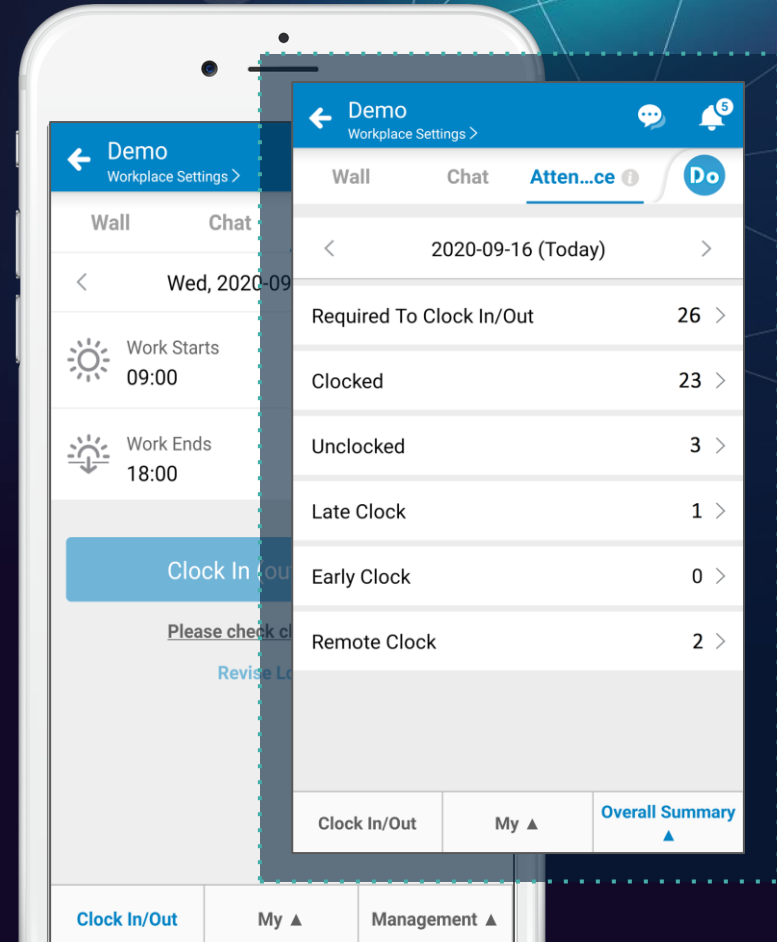


Download  
User Guide

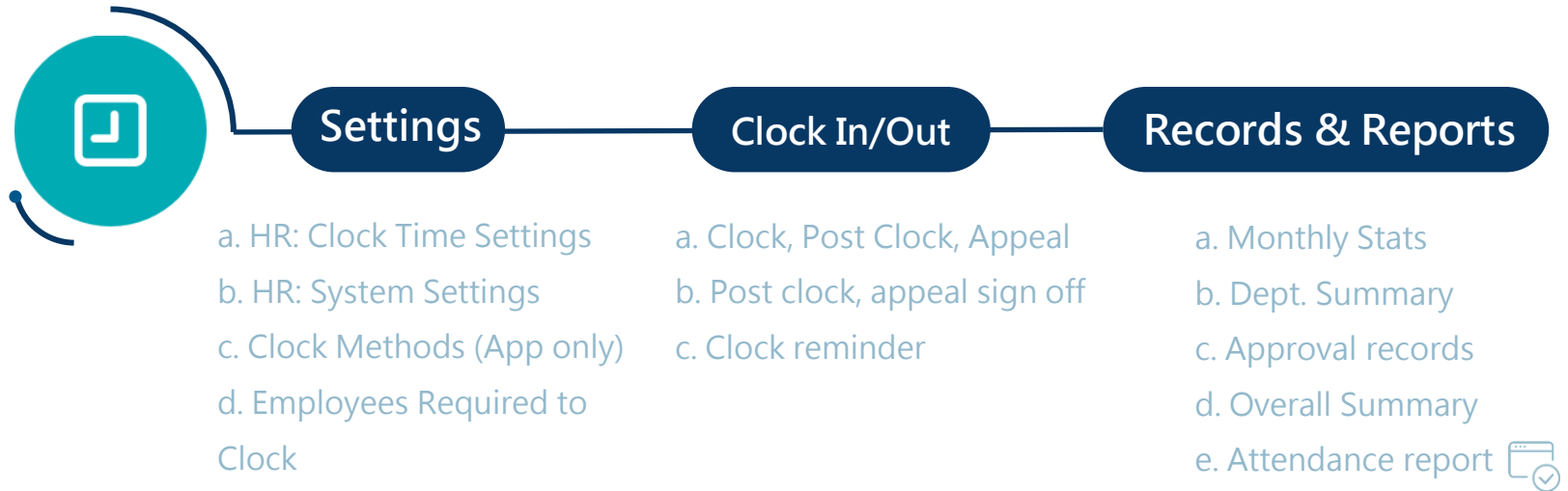
# Attendance

Clock in/out with PC or smartphone and make time clock a thing of the past!

- Clock in/out via PC, smartphone or tablet.
- Linked to HR and Shifts tools.
- Works for employees with flexible work hours, shifts, etc.
- Post clock or appeal when needed.
- HR Staff or Department Managers sign off on post clocks.
- Daily, monthly report available.
- Set clock in/out reminder.
- Export and view attendance report.



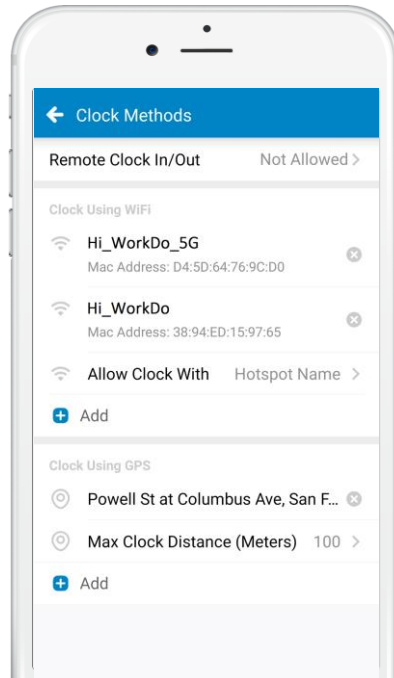
## 3.3 Attendance : Functions & Procedures



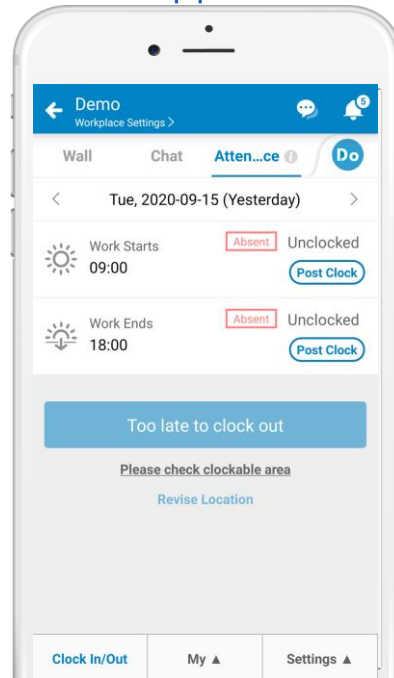
Web version only

## 3.3 Features ( Available functions are dependent on member tool role )

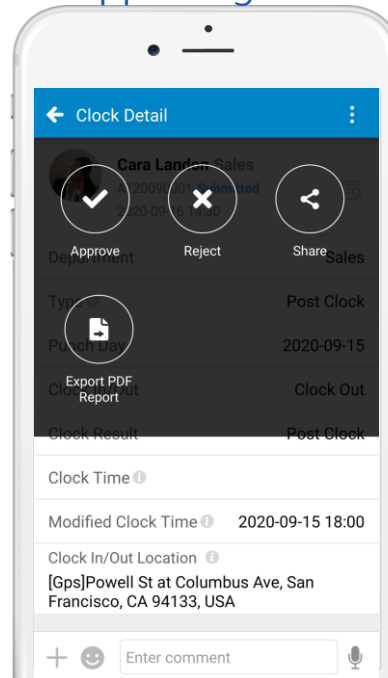
### Settings



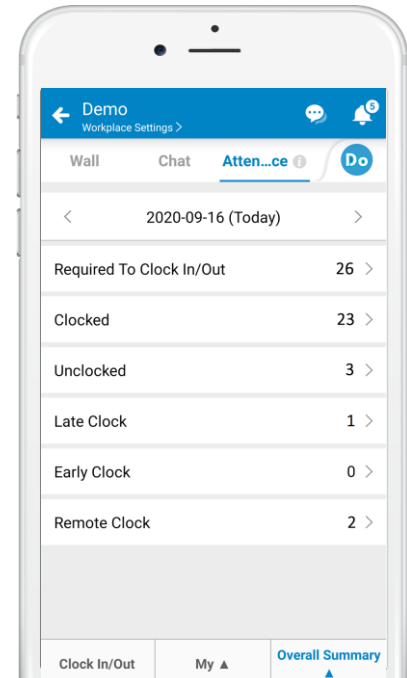
### Clock, Post Clock, Appeal



### Post clock, appeal sign off



### Stats



## 3.4 Check In

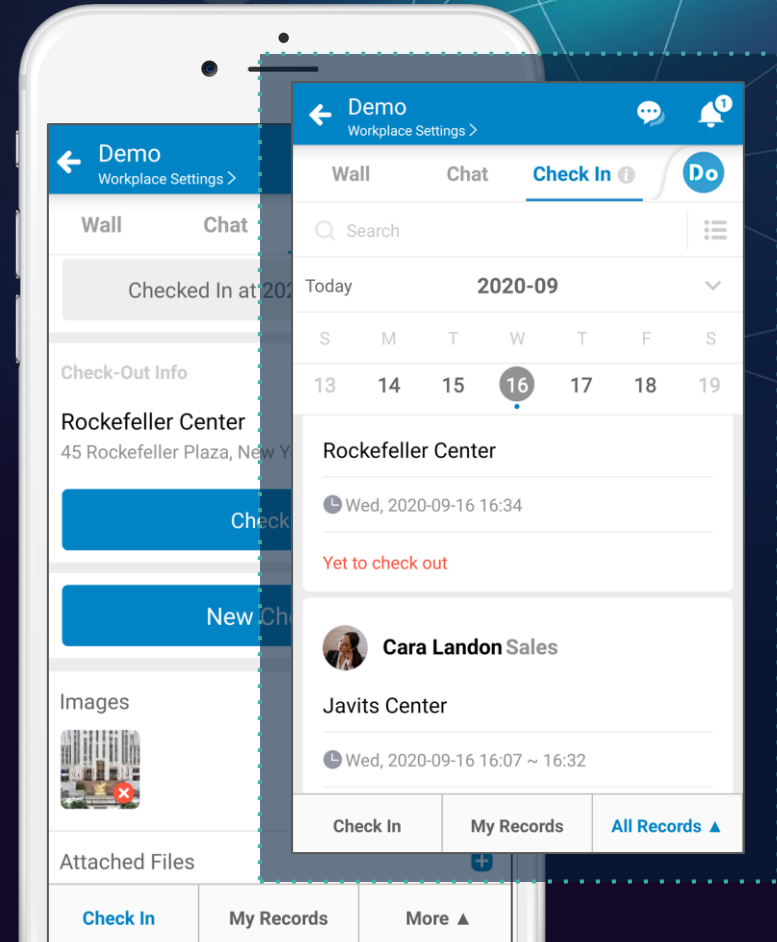
---

- Location check in for the field staff.  
Perfect for the remote staff to record their progress.

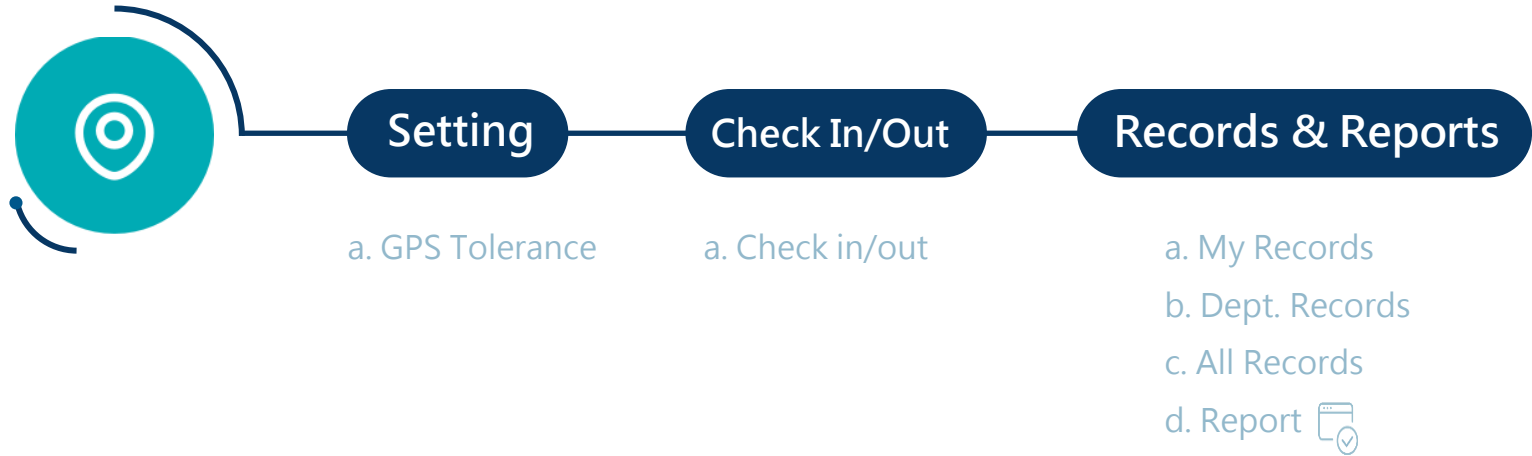
# Check In

A location check in tool designed for field staff management.

- Location check in/out, anytime, anywhere!
- Supports photo and file upload.
- Records the length of time at check in/out locations.
- Set the GPS distance tolerance.
- Check in/out records available.
- List view and calendar view available.
- Report export.



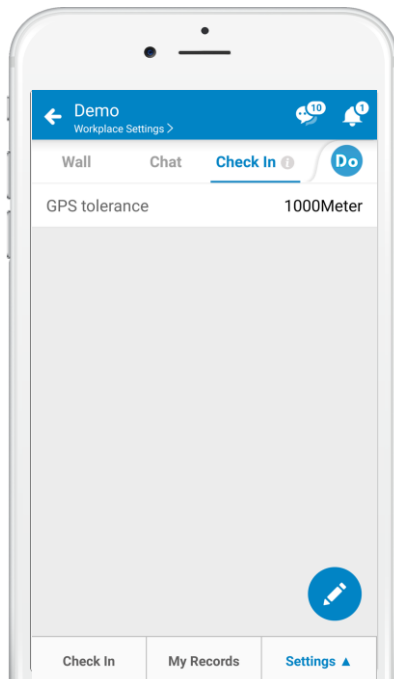
## 3.4 Check-In : Functions & Procedures



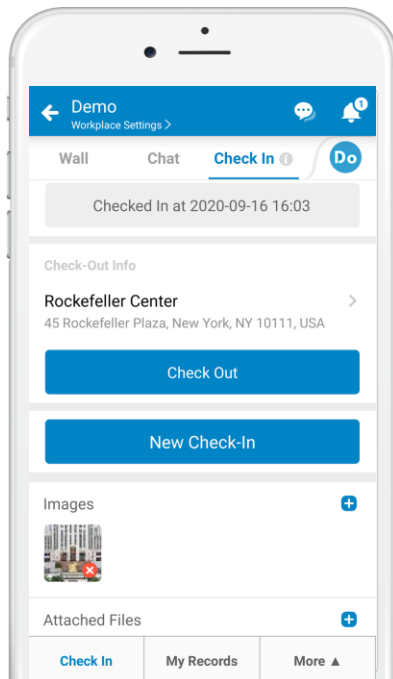
Web version only

## 3.4 Features ( Available functions are dependent on member tool role )

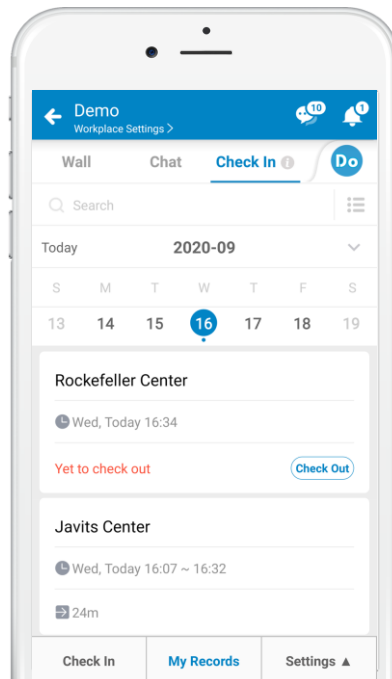
### GPS Tolerance



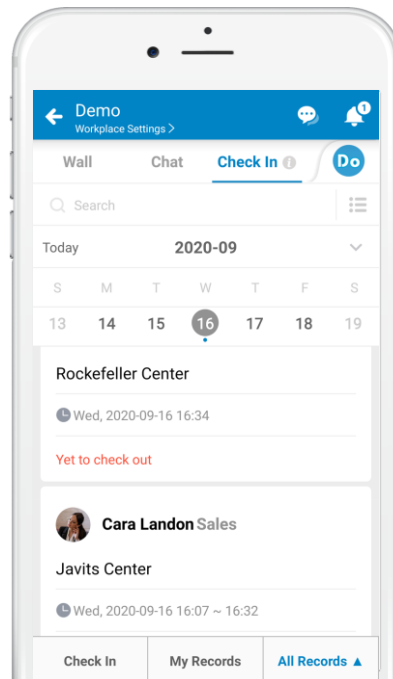
### Check In/Out



### My Records



### All Records





## 3.5 Leave

---

Real-time online leave application and approval.  
An overview displays employees that are on leave.

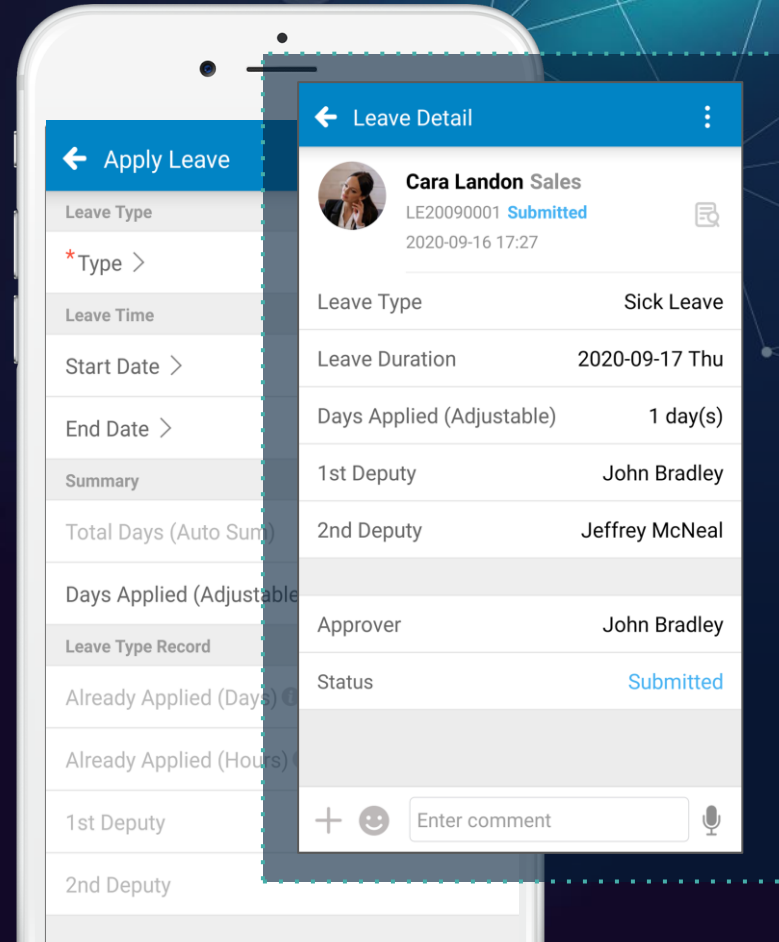


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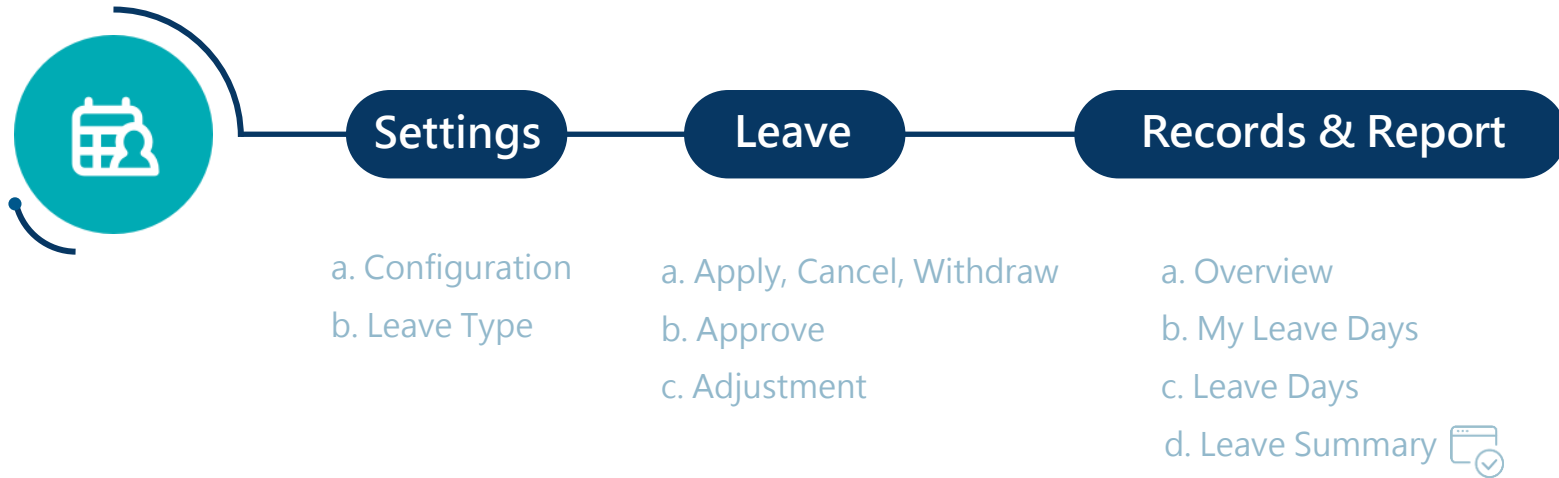
# Leave

A leave management tool that produces leave reports for easy resource management!.

- Perfect for teams that need to record employee leaves.
- Department Managers sign off on leaves.
- Supports multi-level approval process if needed.
- Set and customize different types of leaves.
- Comment section available for communication.
- Leave Overview displays employees on leave.
- Export and view leave report.



## 3.5 Leave : Functions & Procedures



Web version only

## 3.5 Features ( Available functions are dependent on member tool role )

### Set leave base units

← Leave Settings Save

\* Leave Unit > Whole Day

- Whole Day
- Half Day
- Hourly Basis

### Set leave type

← Demo Workplace Settings > Chat Leave Do

Leave Type	Paid Leave
Status	Active
Leave Unit	Whole Day
Leave Type	Sick Leave
Status	Active
Leave Unit	Hourly Basis
Leave Type	Personal Leave
Status	Active
Leave Unit	Hourly Basis
Leave Type	Unpaid Leave

My Leaves My ▲ Leave Type ▲

### Apply

← Apply Leave Submit

Leave Type

\* Type > Personal Leave

Leave Time

- Start

Date > 2020-09-23

HH:MM > Choose HH:MM

AM/PM > Morning

- End

Date > 2020-09-24

HH:MM > Choose HH:MM

AM/PM > Afternoon

Summary

Total Days (Auto Sum) 2 day(s)

Days Applied (Adjustable) > 2 day(s)

### Approve

← Leave Detail

Cara Landon Sales

Approve Reject Escalate

Leave Type Sick Leave

Leave Date 2020-09-17 Thu

Days Applied (Adjustable) 1 day(s)

1st Deputy John Bradley

2nd Deputy Jeffrey McNeal

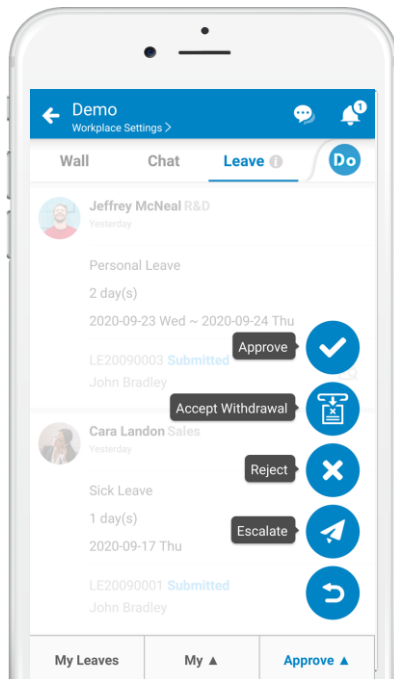
Leave Type Summary (Per Annum)

Leave Type	Sick Leave
Already Applied (Days)	1.0 day(s)
Already Applied (Hours)	0 hour(s)

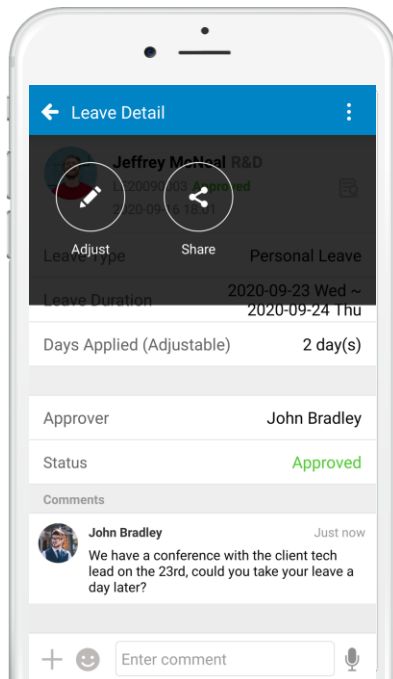
+ 😊 Enter comment

## 3.5 Features ( Available functions are dependent on member tool role )

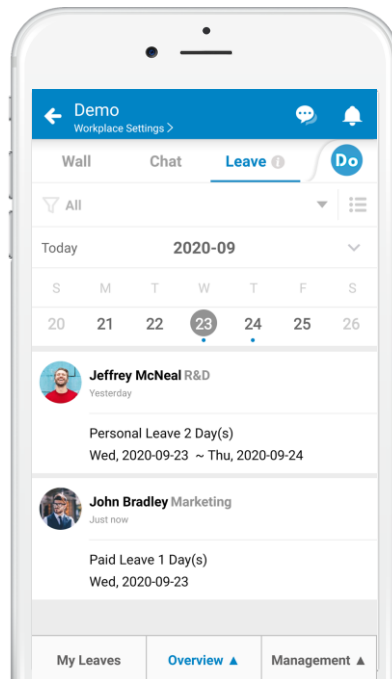
### Batch approve



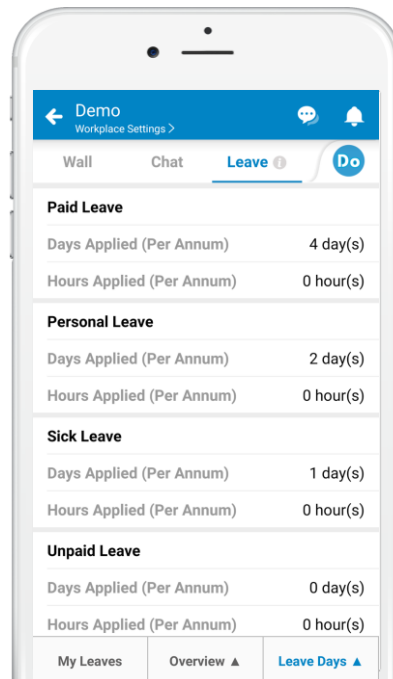
### Adjust leave time



### Leave Overview



### Available leaves



## 3.6 Leave Pro

---

An improved automated leave system that automatically takes care of employee leave quotas, grant dates, carry over date, etc.

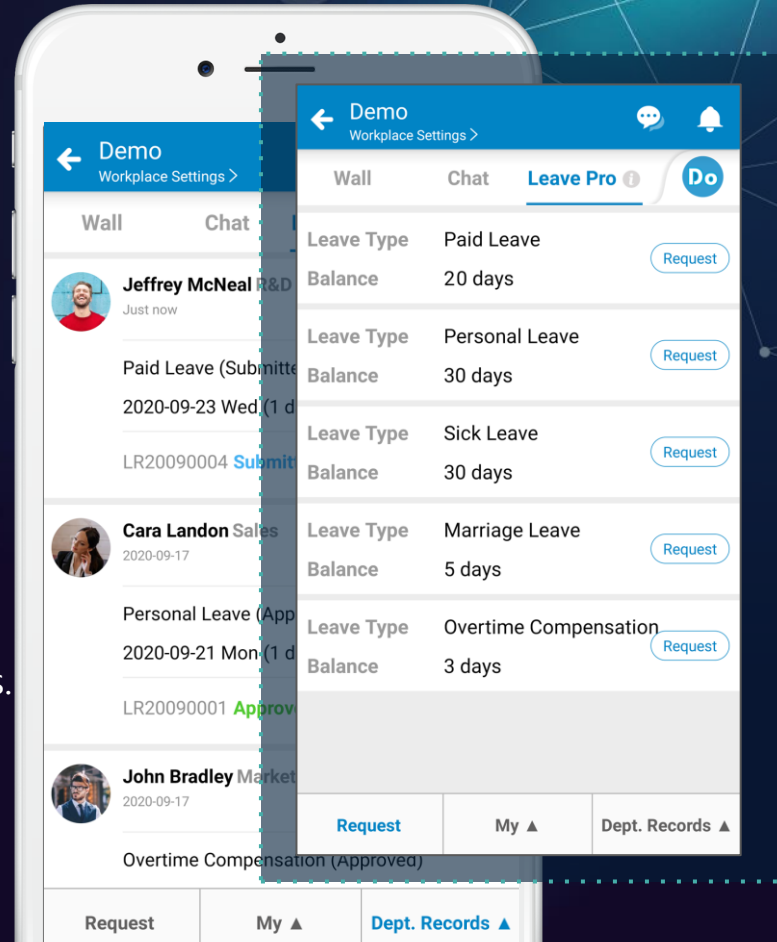


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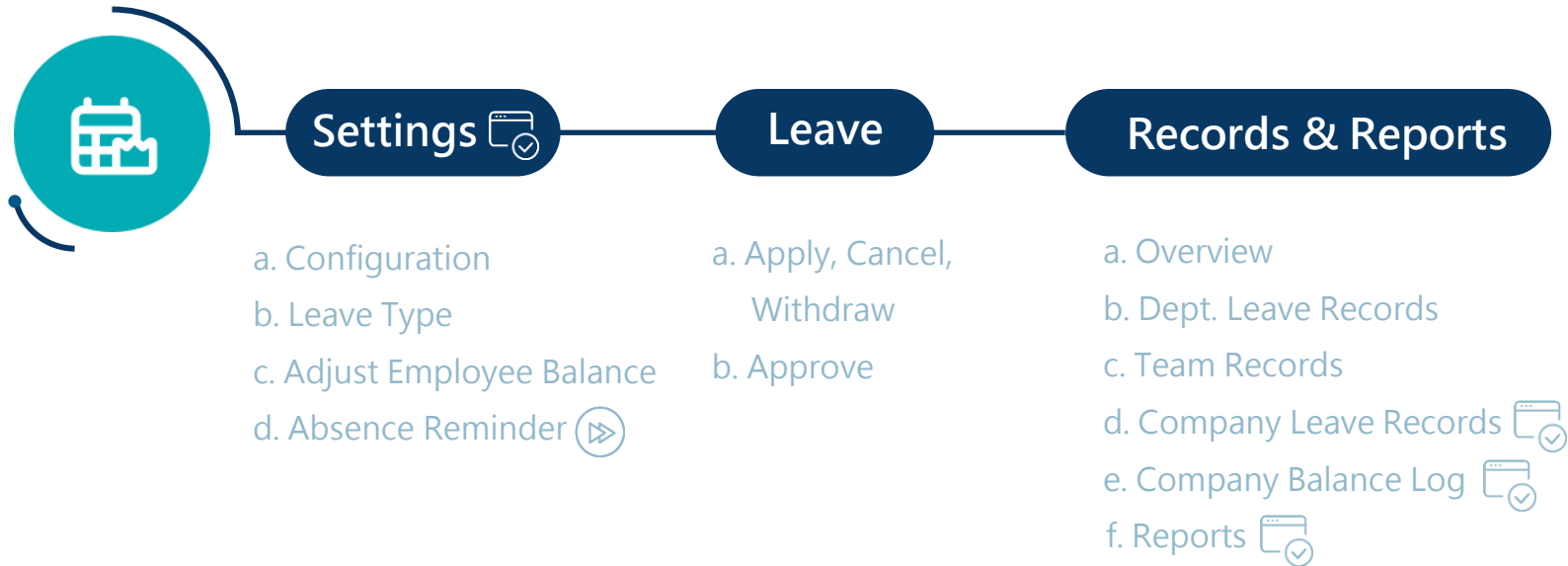
# Leave Pro

An souped-up version of Leave!

- An upgraded and more powerful version of Leave.
- Linked to HR for automated leave calculation.
- Set automated leave grant rules.
- Set grant quotas, applicable employees, etc.
- Set leave carry over date and rules.
- Set leave advancement rules, advanced notice rules.
- Adjust leave days individually when needed.



## 3.6 Leave Pro : Functions & Procedures



Web version only

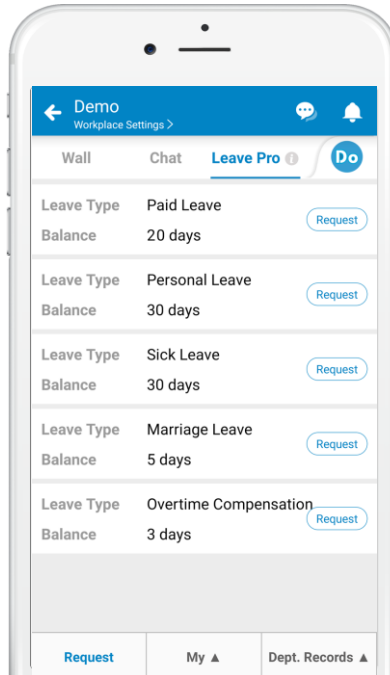


Set to default value, can be skipped for now .

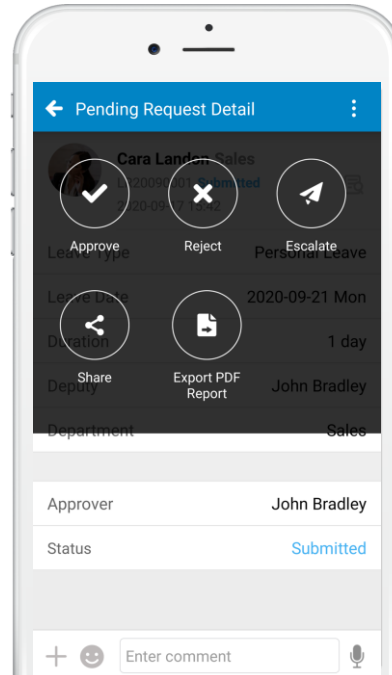


## 3.6 Features ( Available functions are dependent on member tool role )

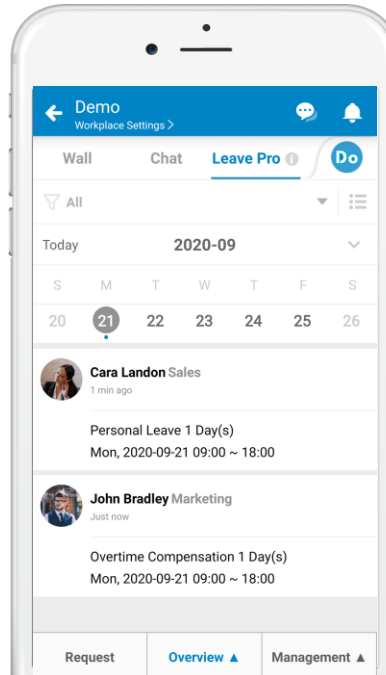
### Leave balance & apply



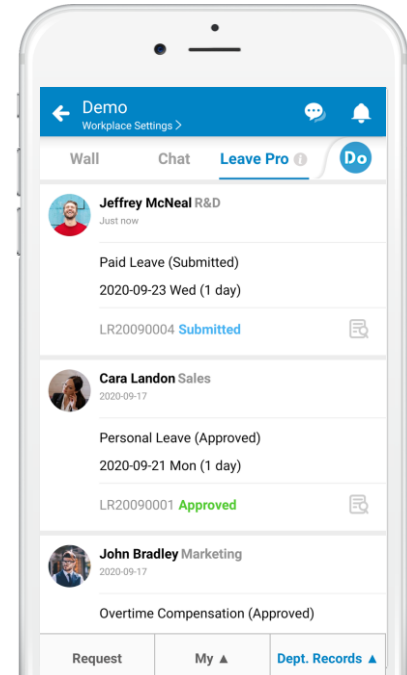
### Approve



### Overview



### Leave records



## 3.7 Shift

---

- A shift scheduling & management tool that works for shift employees!

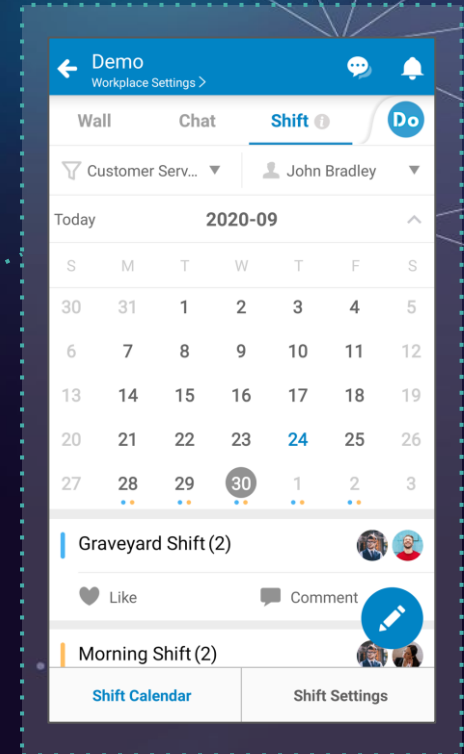
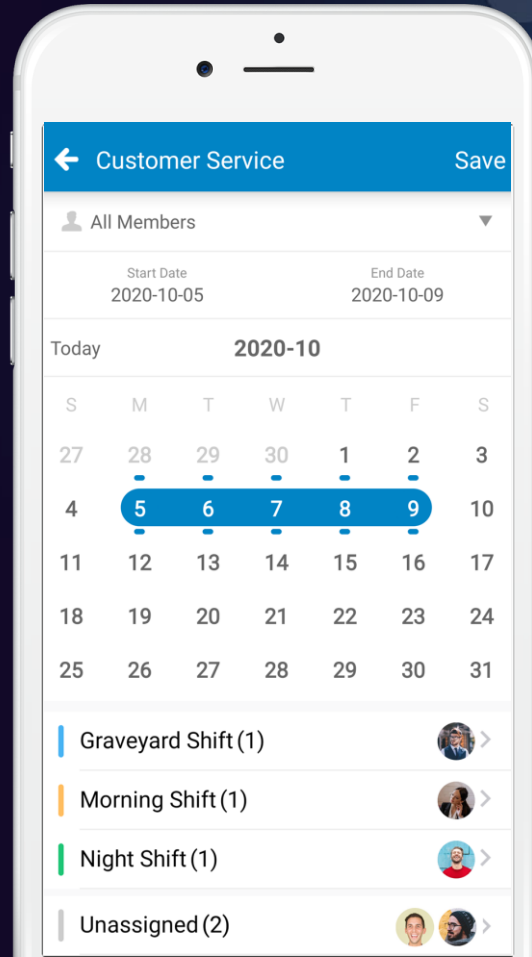


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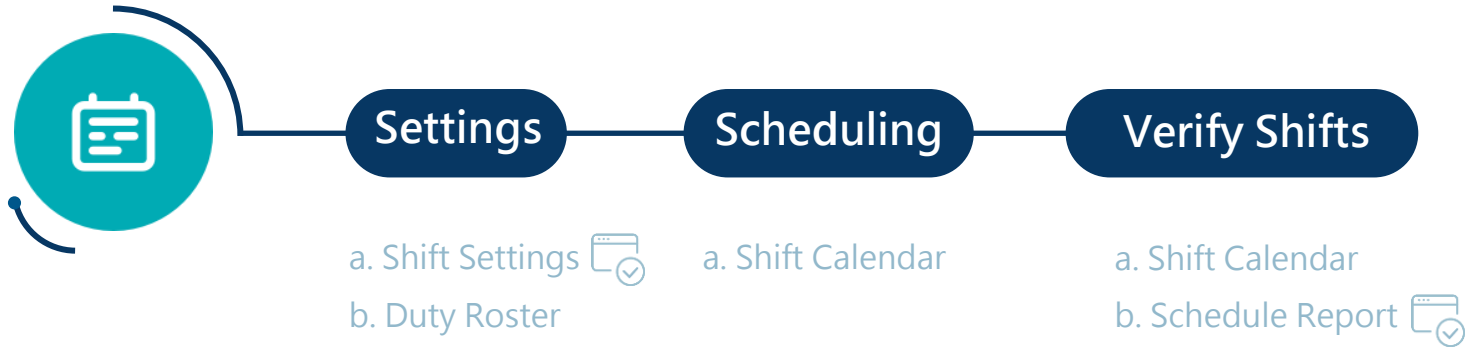
# Shift

Easy to use!  
Simple to manage!

- Manage multiple shift tables.
- Manage rotating shifts & employees.
- Scheduling by a date or time period.
- Send notifications to shift employees.
- A comment section available for handover details.
- View shifts of specific employees.
- Employees can quickly verify their schedules.



## 3.7 Shift : Functions & Procedures



Web version only

## 3.7 Features ( Available functions are dependent on member tool role )

### Create shifts

The 'Create Shift Table' screen shows a form for creating a new shift table. At the top, there's a blue header with a back arrow, the title 'Create Shift Table', and a 'Save' button. Below the header, the form includes a 'Shift Table Name' field with the value 'Front Desk', a 'Desc.' field with the text 'Temporary Front Desk Rotation.', and an 'Employees (3)' section showing three employee avatars. Under the 'Shifts' section, there are two shift entries. The first entry is for a 'Morning Shift' with a start time of 09:30 and an end time of 13:30. The second entry is for an 'Afternoon Shift' with a start time of 13:30 and an end time of 17:30. Each shift entry has a red minus icon to its left. A blue plus icon is located at the bottom right of the screen.

### Shift tables

The 'Shift tables' screen displays a list of existing shift tables. The top blue header has a back arrow, the title 'Demo', and icons for chat and notifications. Below the header, there are tabs for 'Wall', 'Chat', and 'Shift', with the 'Shift' tab currently selected. A search bar labeled 'Enter Shift Table Name' is positioned above a list of shift tables. The list includes 'Call Center' (Employees 2), 'Customer Service' (Employees 3), and 'Front Desk' (Employees 3). At the bottom of the screen, there are two buttons: 'Shift Calendar' and 'Shift Settings'.

### Scheduling

The 'Scheduling' screen shows a calendar view for scheduling shifts. The top blue header has a back arrow, the title 'Customer Service', and a 'Save' button. Below the header, there's a section for 'All Members' with a dropdown arrow. The main area displays a calendar for the month of October 2020, with the dates from 27 to 31. The calendar shows a grid of days with numbers. Below the calendar, there's a list of shifts: 'Graveyard Shift (1)', 'Morning Shift (1)', 'Night Shift (1)', and 'Unassigned (2)'. Each shift entry has an employee avatar to its right.

### Verify shifts

The 'Verify shifts' screen displays a calendar view for verifying shifts. The top blue header has a back arrow, the title 'Demo', and icons for chat and notifications. Below the header, there are tabs for 'Wall', 'Chat', and 'Shift', with the 'Shift' tab currently selected. A dropdown menu shows 'Customer Serv...' and a user selection dropdown shows 'John Bradley'. The main area displays a calendar for the month of September 2020, with the dates from 30 to 3. Below the calendar, there's a list of shifts: 'Graveyard Shift (2)' and 'Morning Shift (2)'. Each shift entry has employee avatars to its right. At the bottom, there are two buttons: 'Shift Calendar' and 'Shift Settings'.

## 3.8 Overtime

---

Manage employee overtime hours to avoid overload.

Online overtime application with compensations.

Achieve a healthy work-life balance!

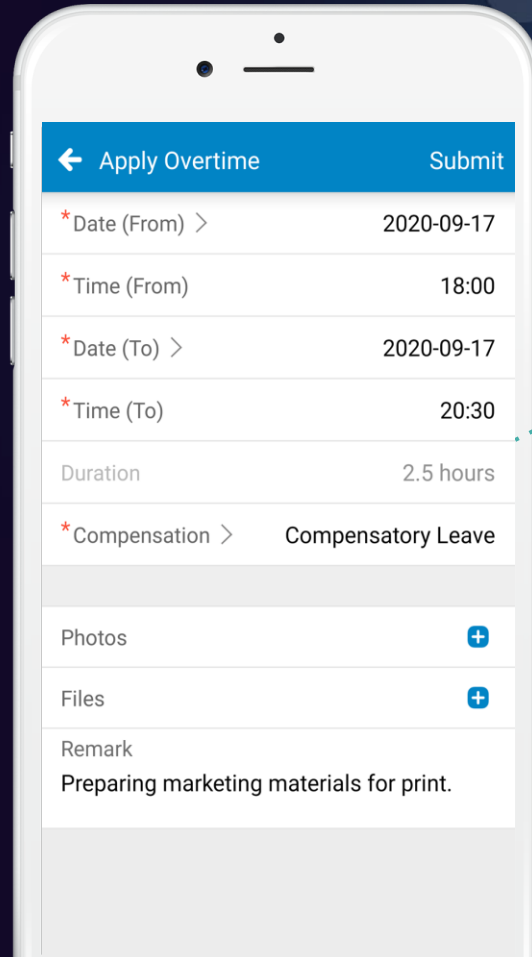


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# Overtime

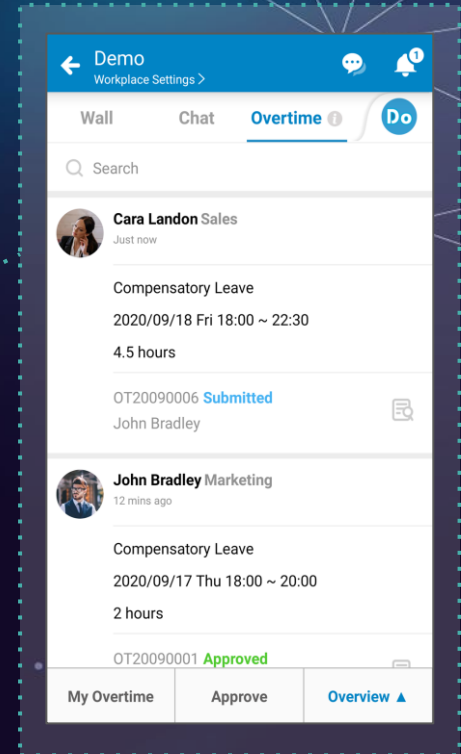
No more burnouts!  
Use Overtime to help employees  
achieve a healthy work-life balance.

- Hour or half-hour overtime base unit.
- Select compensatory leave or overtime pay.
- Set request policy.
- Linked to HR for application approval.
- Multi-level approval, if needed.
- Comment section for communication.
- Overtime report available.



Smartphone screen showing the 'Apply Overtime' form. The form includes fields for Date (From), Time (From), Date (To), Time (To), Duration, and Compensation. Below these fields are sections for Photos, Files, and a Remark.

← Apply Overtime		Submit
* Date (From) >	2020-09-17	
* Time (From)	18:00	
* Date (To) >	2020-09-17	
* Time (To)	20:30	
Duration	2.5 hours	
* Compensation >	Compensatory Leave	
Photos		
Files		
Remark		
Preparing marketing materials for print.		



Tablet screen showing the 'Demo' app interface. The interface includes a top navigation bar with 'Wall', 'Chat', and 'Overtime' tabs. Below the navigation bar is a search bar. The main content area displays a list of overtime requests, each with a user profile picture, name, and details of the request.

Demo		Workplace Settings >	⋮	🔔
Wall	Chat	Overtime	Do	
🔍 Search				
<b>Cara Landon Sales</b> Just now				
Compensatory Leave 2020/09/18 Fri 18:00 ~ 22:30 4.5 hours				
OT20090006 Submitted John Bradley				
<b>John Bradley Marketing</b> 12 mins ago				
Compensatory Leave 2020/09/17 Thu 18:00 ~ 20:00 2 hours				
OT20090001 Approved				
My Overtime	Approve	Overview ▲		

## 3.8 Overtime : Functions & Procedures

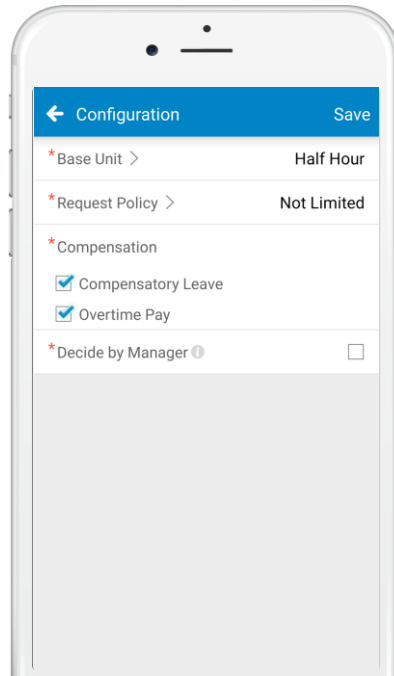


Web version only



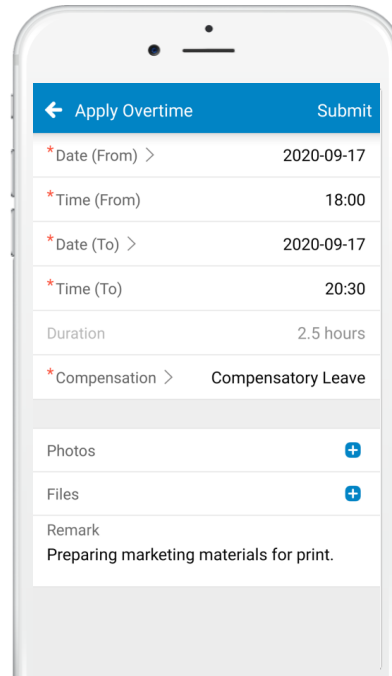
## 3.8 Features ( Available functions are dependent on member tool role )

### Settings



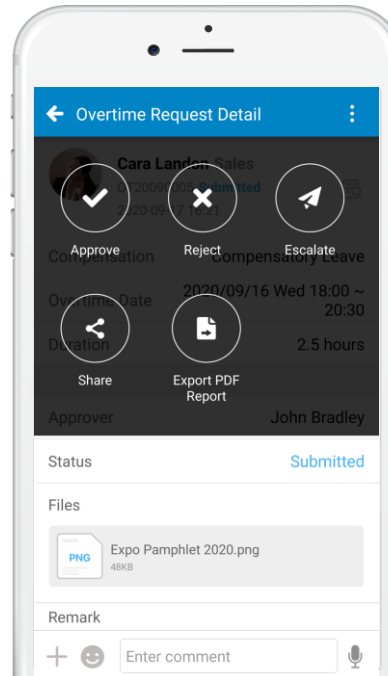
Smartphone mockup showing the Settings screen. The screen has a blue header with a back arrow, "Configuration", and a "Save" button. The main content area lists settings for overtime: "Base Unit" is "Half Hour", "Request Policy" is "Not Limited", "Compensation" has checkboxes for "Compensatory Leave" and "Overtime Pay" (both checked), and "Decide by Manager" has an unchecked checkbox. At the bottom, there are sections for "Photos" and "Files" (both with a plus icon) and a "Remark" field containing the text "Preparing marketing materials for print."

### Apply



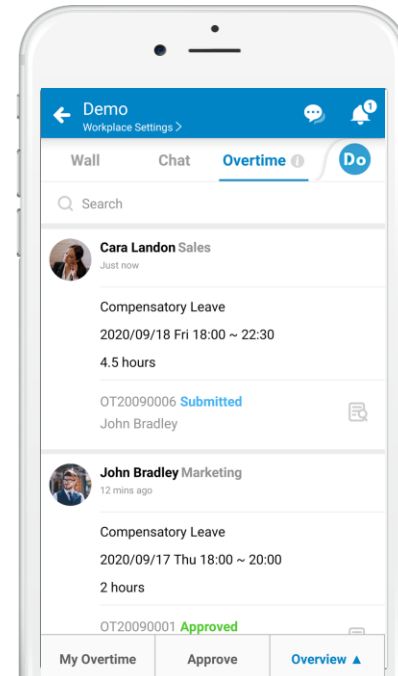
Smartphone mockup showing the Apply screen. The screen has a blue header with a back arrow, "Apply Overtime", and a "Submit" button. The main content area contains form fields: "Date (From)" is "2020-09-17", "Time (From)" is "18:00", "Date (To)" is "2020-09-17", "Time (To)" is "20:30", "Duration" is "2.5 hours", and "Compensation" is "Compensatory Leave". At the bottom, there are sections for "Photos" and "Files" (both with a plus icon) and a "Remark" field containing the text "Preparing marketing materials for print."

### Approve



Smartphone mockup showing the Approve screen. The screen has a blue header with a back arrow, "Overtime Request Detail", and a menu icon. The main content area shows a request for "Compensatory Leave" from "John Bradley" for the date "2020/09/16 Wed 18:00 ~ 20:30" with a duration of "2.5 hours". There are three circular buttons: "Approve" (with a checkmark), "Reject" (with an X), and "Escalate" (with a paper plane). Below these are "Share" and "Export PDF Report" buttons. The "Status" is "Submitted". At the bottom, there is a "Files" section showing a file named "Expo Pamphlet 2020.png" (48KB) and a "Remark" field with a plus icon, a smiley face icon, and a text input field containing "Enter comment".

### Records



Smartphone mockup showing the Records screen. The screen has a blue header with a back arrow, "Demo", and icons for "Wall", "Chat", "Overtime", and a "Do" button. The main content area shows a list of overtime records. The first record is for "Cara Landon Sales" with the text "Compensatory Leave 2020/09/18 Fri 18:00 ~ 22:30 4.5 hours" and a status of "Submitted". The second record is for "John Bradley Marketing" with the text "Compensatory Leave 2020/09/17 Thu 18:00 ~ 20:00 2 hours" and a status of "Approved". At the bottom, there are three buttons: "My Overtime", "Approve", and "Overview".

## 3.9 Timesheet

---

Efficiently keep track of employee and project work hours.  
Timely allocate team resources and improve team productivity.

# Timesheet

Use Timesheet to track employee work hours and project time tracking with ease!

- Task employees with projects.
- Timesheet allows employees to log their own work hours.
- Track employees' time spent on each task and project.
- Use notifications to remind employees to fill out their work hours.
- Linked to Overtime for overtime application when employees are working overtime.
- Timesheet reports available.
- Employees' activity records available.

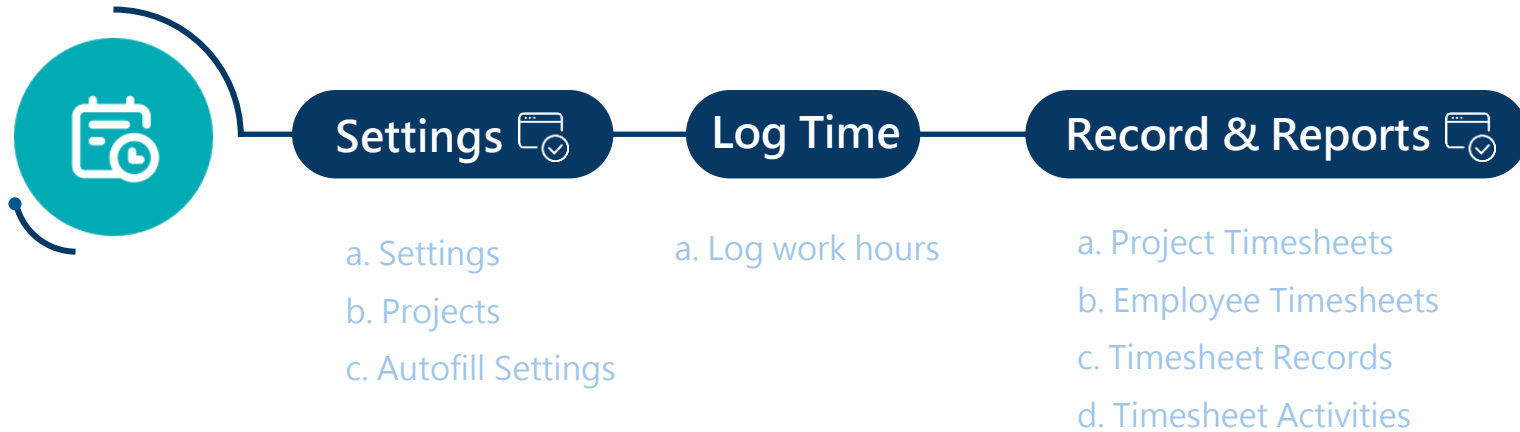
The image shows a smartphone screen with the Timesheet application. The main screen displays a list of projects under the heading 'Demo Workplace Settings >'. The projects listed are:

- A01. Online Marketing (A. Inno Corp Collabora)
- A02. Web Design (A. Inno Corp Collabora)
- A03. Brand Marketing (A. Inno Corp Collabora)
- B01. Consumer Electr (B. MK-2 Product Launc)
- B02. Live Stream Proc (B. MK-2 Product Launc)

Overlaid on the right is a modal form titled 'Input Work Hours' with a 'Save' button. The form contains the following fields:

- \*Date > 2021-10-21
- \*Project Name A02. Web Design
- Work Hours 4.00h
- Action Items
  - \*Work Hours > 1.5
    - Content Sprint meeting
  - \*Work Hours > 2.5
    - Content Front-end design
  - + Add

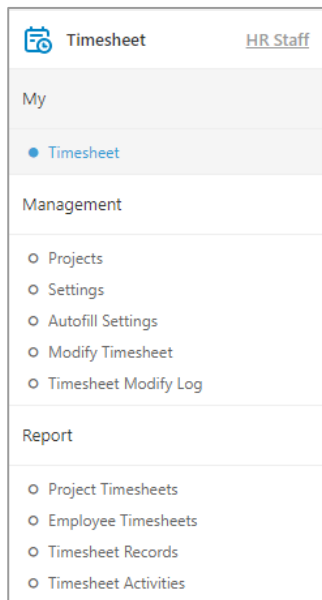
## 3.9 Timesheet : Functions & Procedures



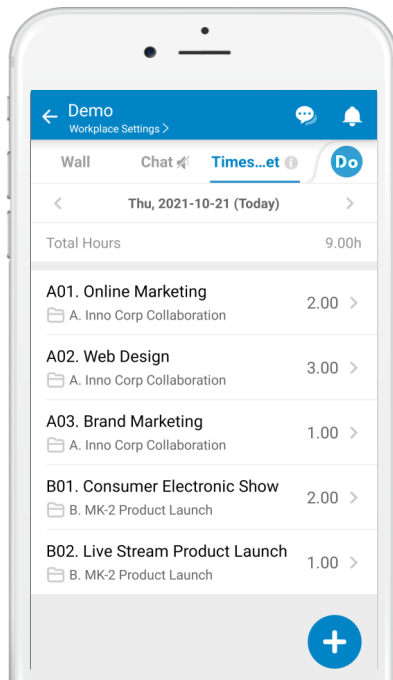
Web version only

## 3.9 Features ( Available functions are dependent on member tool role )

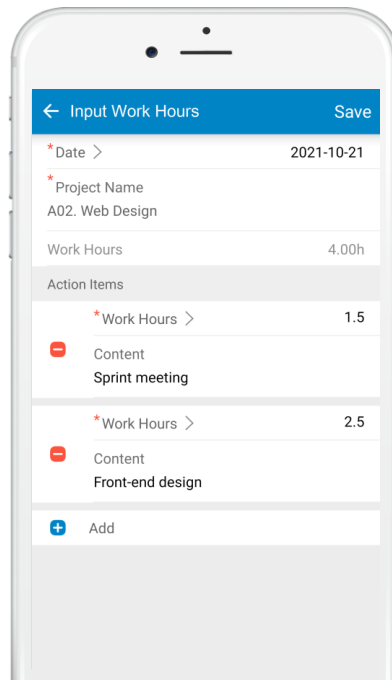
### Web version Settings & reports



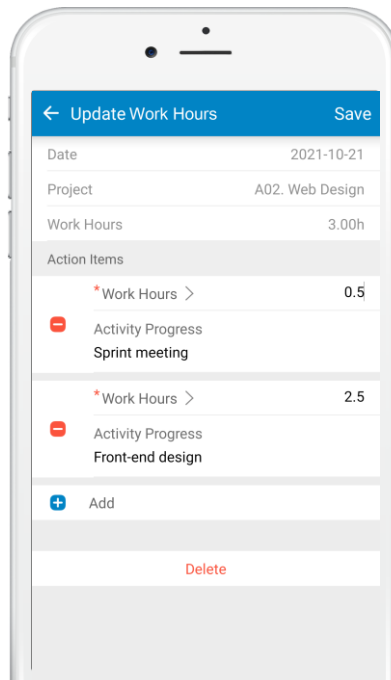
### Daily overview



### Log time



### Edit



## 3.10 Expenses

---

- Streamlined expense reimbursement workflow with progress tracking.



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# Expenses

Paperless reimbursement process.  
Past requests are archived for audit.

- Built-in common expense types, including travel, transportation, communication, meals, etc.
- Create new expense types your workplace uses.
- Drafts can be saved or submitted for approval.
- Attach files or photos as receipts or proof.
- Linked to HR for managers approvals.
- Supports multi-level approval process or select a designated approver.
- Use the comment section to communicate details.

**Create Expense**

\*Subject  
Enter Subject

\*Currency  
United States Dollar

Total

Edit Item List

\*Expense Type >

\*Amount >

Date

Start Date >

End Date >

Item Desc.  
Enter Item Desc.

**Expense Detail**

**John Bradley Marketing**  
EX20090005 **Approved**  
2020-09-24 16:55

Subject  
MWC Travel Expenses

Currency  
United States Dollar

Total  
\$1,140

Date Range  
2020-04-20~2020-04-28

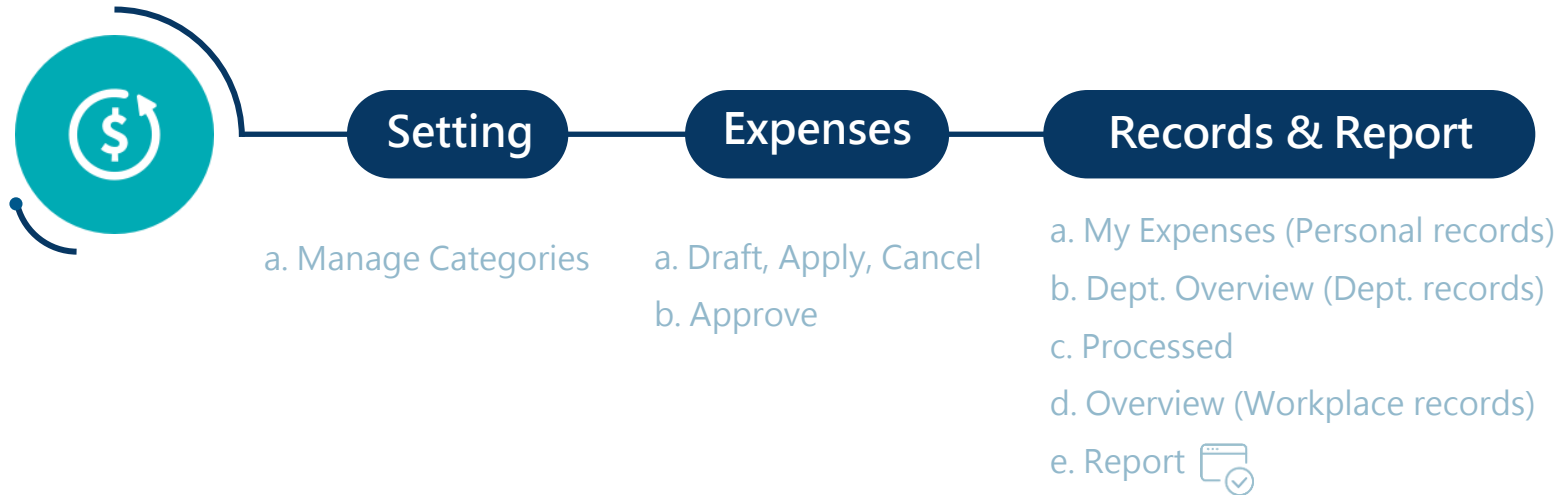
View Item List

Transportation	\$195
2020-04-22 ~ 2020-04-27	
Travel	\$945
2020-04-20 ~ 2020-04-28	

+ 😊 Enter comment

**Add**

## 3.10 Expenses : Functions & Procedures

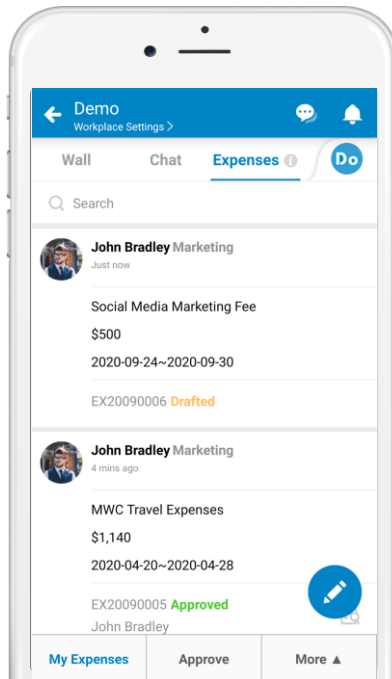


Web version only

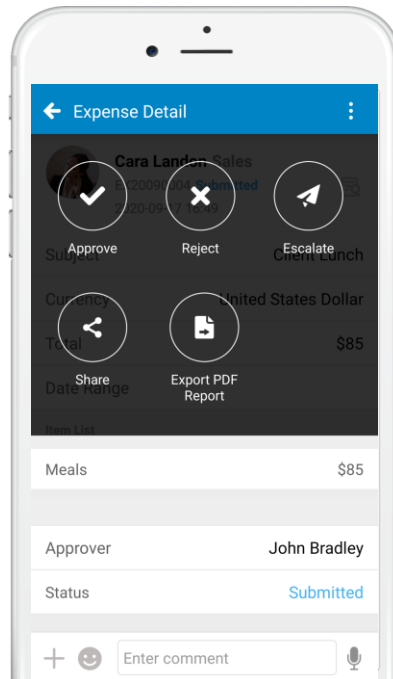


## 3.10 Features ( Available functions are dependent on member tool role )

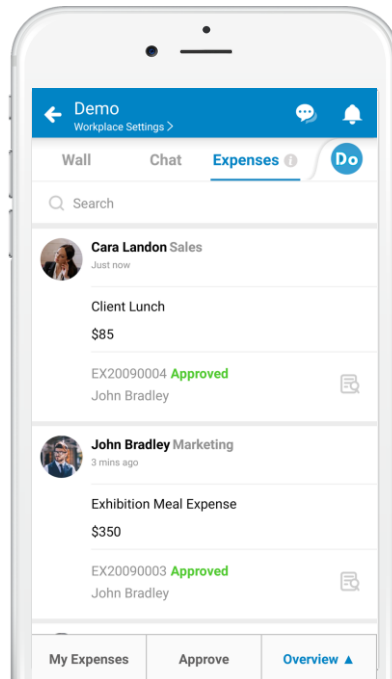
### My Expenses



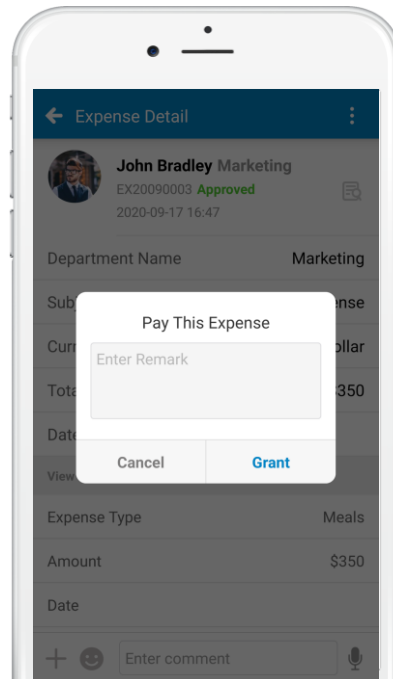
### Approve



### Overview



### Grant



## 3.11 Approvals

---

Simplify a typically cumbersome process.  
Make timely and informed decisions with Approvals.

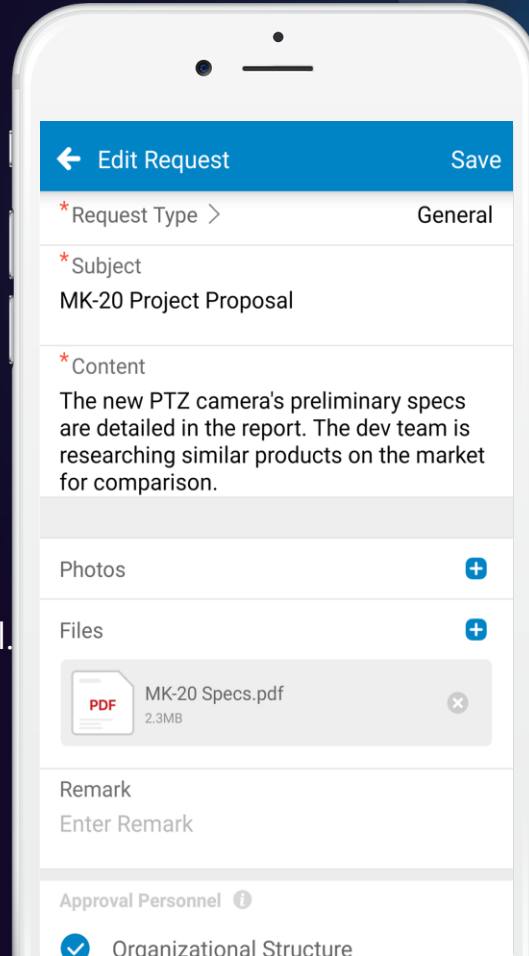


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# Approvals

Streamlined approval process.  
Improve team productivity.

- Linked to HR for managers approvals.
- Create new approval types your workplace uses.
- Attach files or photos for references.
- Drafts can be saved or submitted for approval.
- Supports multi-level approval process or select a designated approver.
- Use the comment section to communicate details.



The smartphone screen displays the 'Edit Request' form. At the top, there is a blue header bar with a back arrow, the text 'Edit Request', and a 'Save' button. Below the header, the form has several sections: 'Request Type' set to 'General', 'Subject' as 'MK-20 Project Proposal', and 'Content' with a text description about PTZ camera specs. There are sections for 'Photos' and 'Files' (with a PDF file 'MK-20 Specs.pdf' attached), a 'Remark' section with a placeholder 'Enter Remark', and an 'Approval Personnel' section at the bottom with a checked box for 'Organizational Structure'.

← Edit Request Save

\*Request Type > General

\*Subject  
MK-20 Project Proposal

\*Content  
The new PTZ camera's preliminary specs are detailed in the report. The dev team is researching similar products on the market for comparison.

Photos +

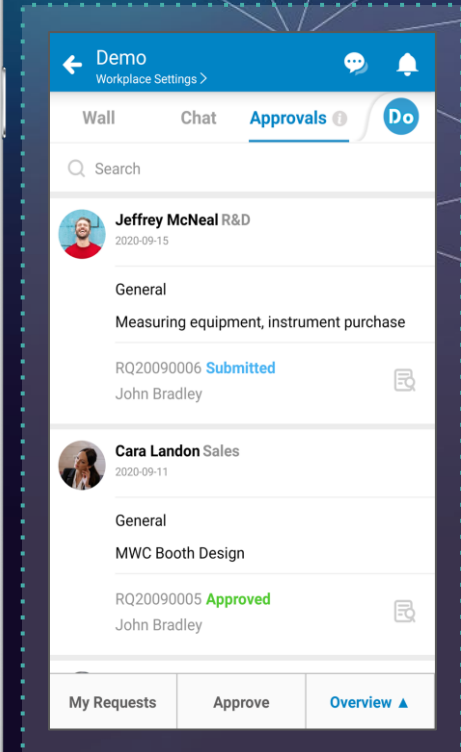
Files +

MK-20 Specs.pdf 2.3MB x

Remark  
Enter Remark

Approval Personnel ⓘ

✓ Organizational Structure



The tablet screen shows a 'Demo' workspace with a 'Workplace Settings >' link. It has tabs for 'Wall', 'Chat', and 'Approvals' (which is active). Below the tabs is a search bar. The main content area lists two approval items. The first item is by Jeffrey McNeal (R&D, 2020-09-15) for 'Measuring equipment, instrument purchase' with status 'Submitted' and approver 'John Bradley'. The second item is by Cara Landon (Sales, 2020-09-11) for 'MWC Booth Design' with status 'Approved' and approver 'John Bradley'. At the bottom, there are three buttons: 'My Requests', 'Approve', and 'Overview ▲'.

← Demo Workplace Settings >

Wall Chat Approvals ⓘ Do

Q Search

**Jeffrey McNeal** R&D  
2020-09-15

General  
Measuring equipment, instrument purchase

RQ20090006 Submitted John Bradley

**Cara Landon** Sales  
2020-09-11

General  
MWC Booth Design

RQ20090005 Approved John Bradley

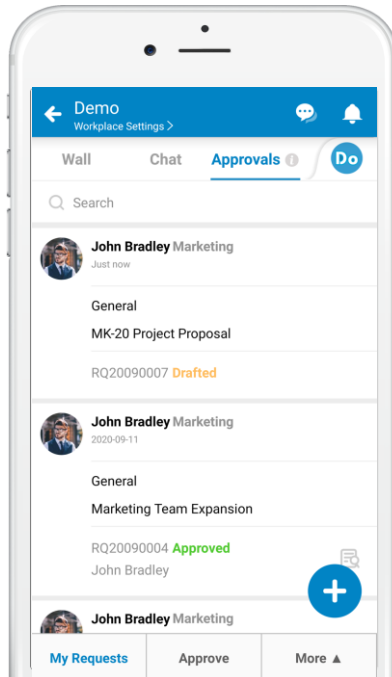
My Requests Approve Overview ▲

## 3.11 Approvals : Functions & Procedures

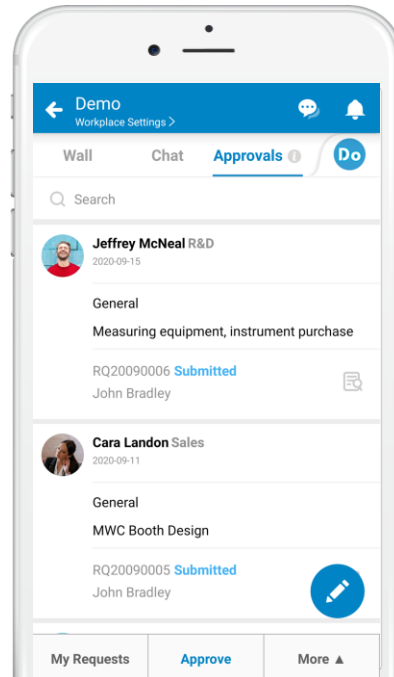


## 3.11 Features ( Available functions are dependent on member tool role )

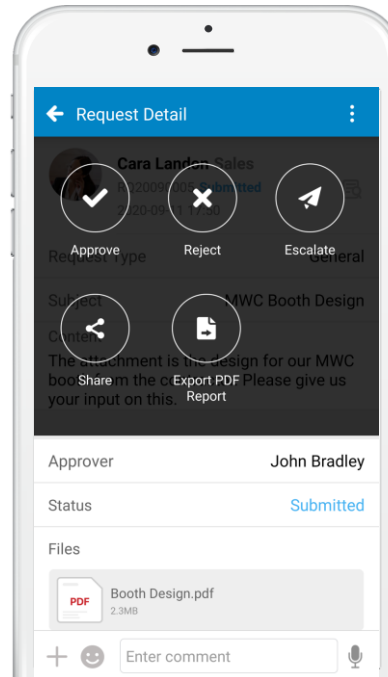
### Requests



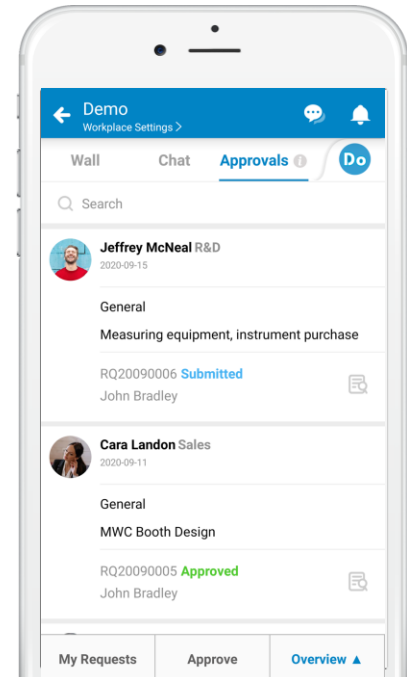
### Approve



### Approve, reject or escalate



### Overview



## 3.12 Conf. Rm

---

Manage and book conference rooms for  
meetings or events!

Linked to Event for advanced booking.

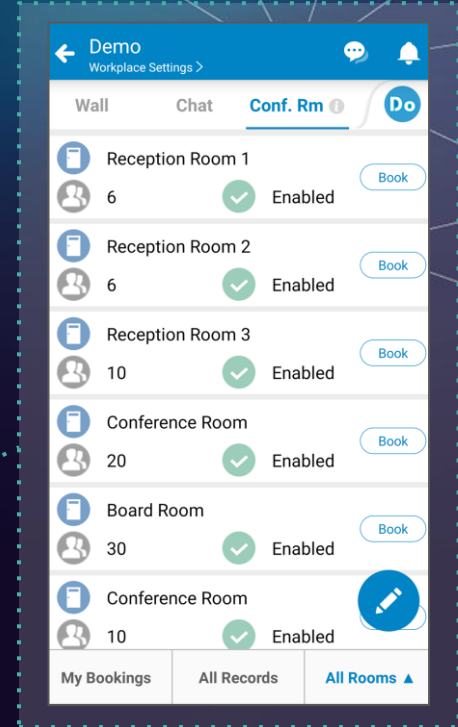
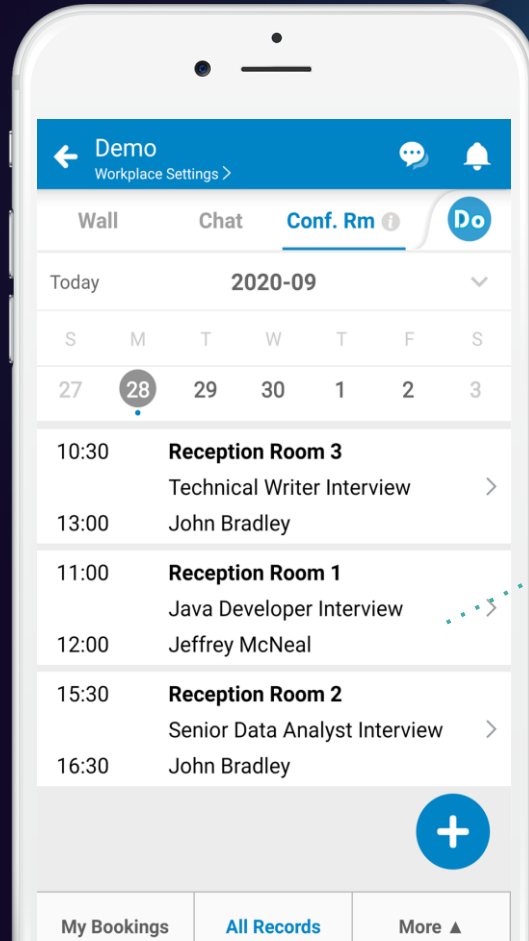


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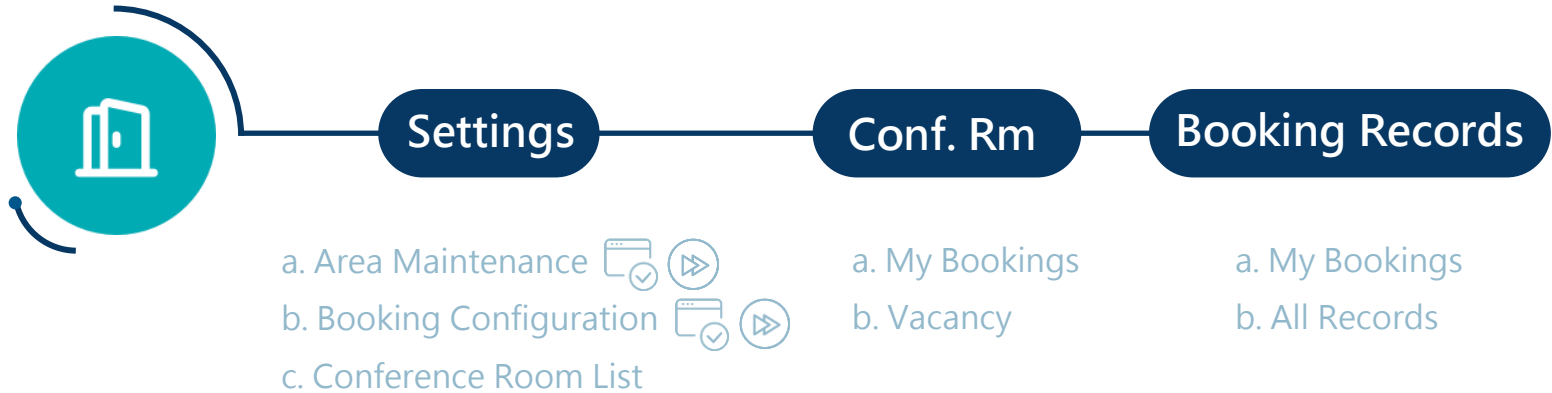
# Conf. Rm

Manage conference room to maximize their use and avoid conflicts.

- Book rooms in advance.
- Linked to the Event tool.
- An effective resource management tool.
- The web version allows recurrent room booking.



## 3.12 Conf. Rm : Functions & Procedures



Web version only

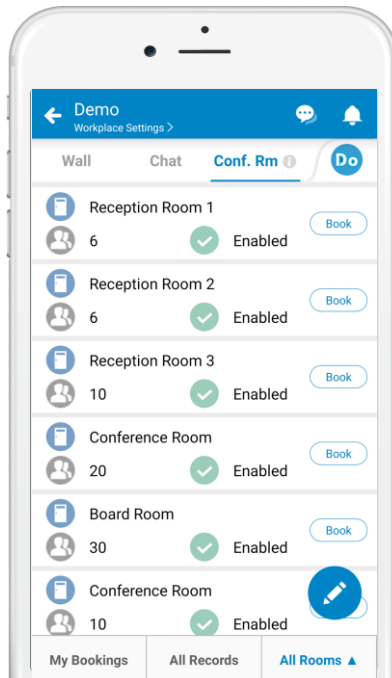


Set to default value, can be skipped for now .

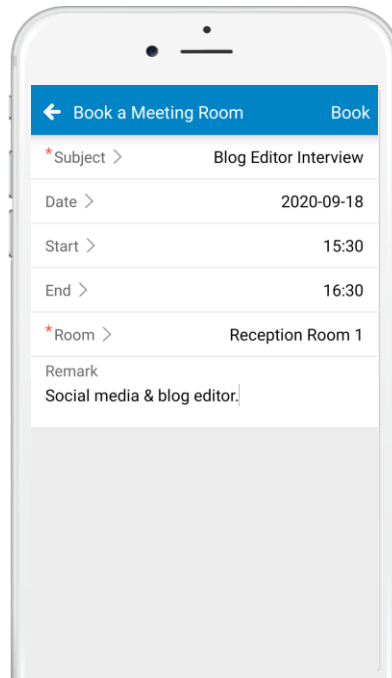


## 3.12 Features ( Available functions are dependent on member tool role )

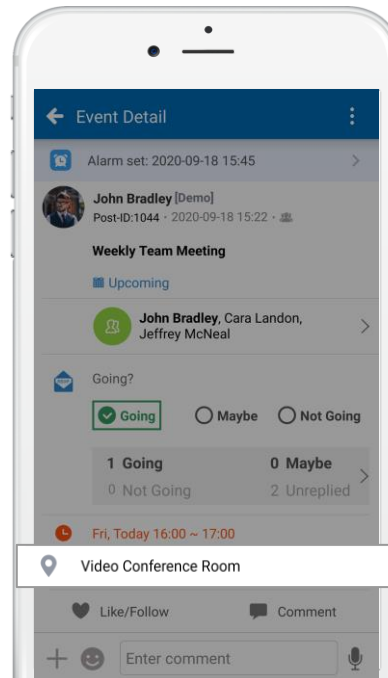
### Booking Configuration



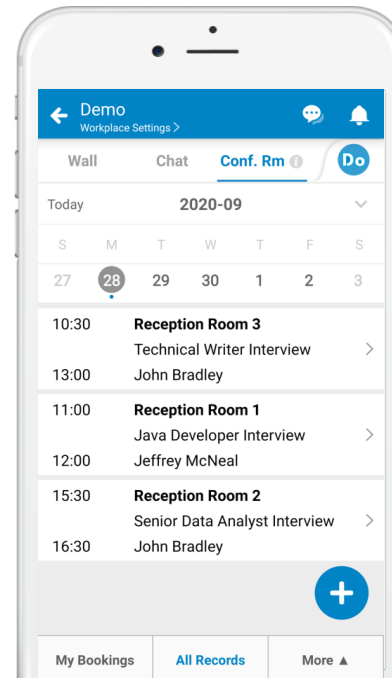
### Book



### Book via Event



### All Records



## 3.13 CRM

---

Store your client, customer contact information and document activities and exchanges to keep them satisfied.



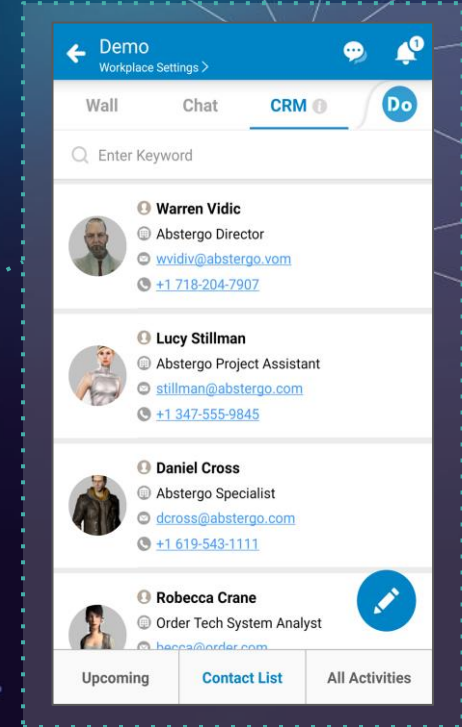
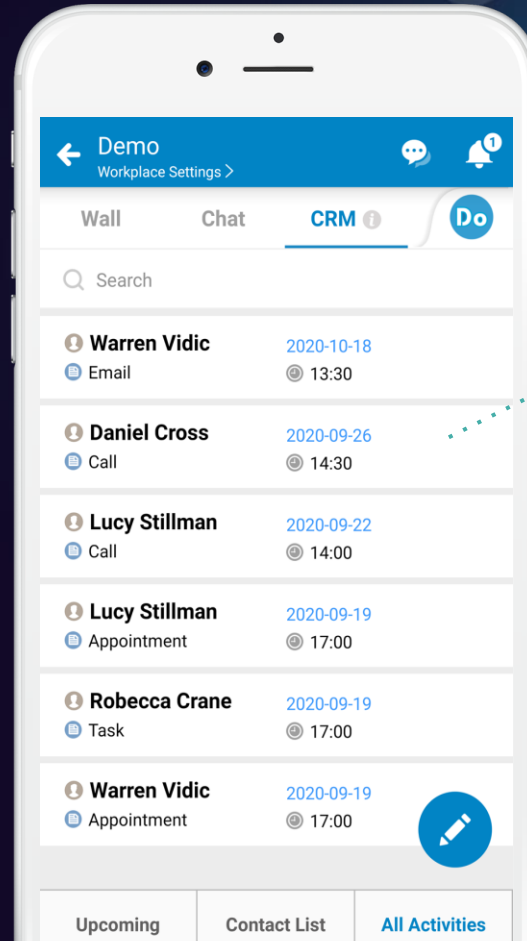
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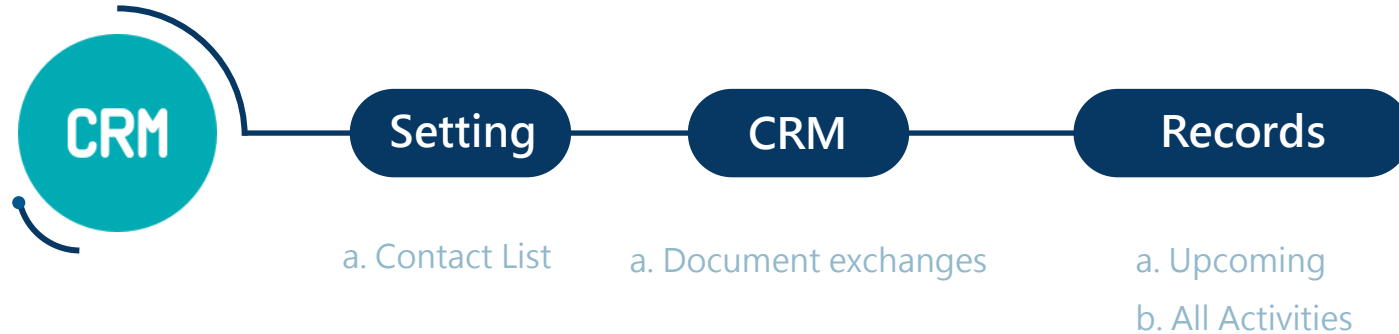
# CRM

Manage clients with precision to raise client satisfaction!

- Import contact info from your phone.
- A centralized place of the clients' contact info.
- Document interactions and exchanges and never forget a thing!
- An effective way to maintain client relationships.
- The managers and tool admins are allowed to view members' data.

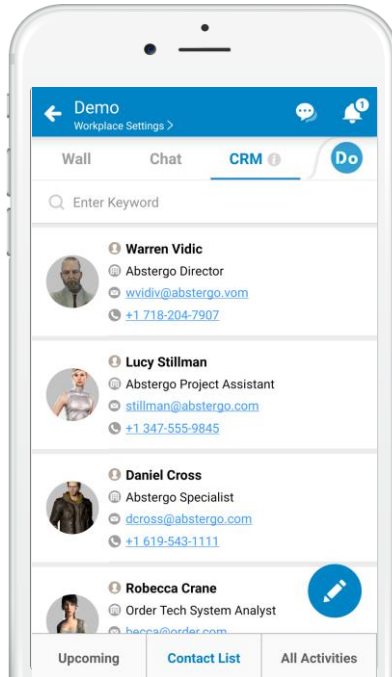


## 3.13 CRM : Functions & Procedures

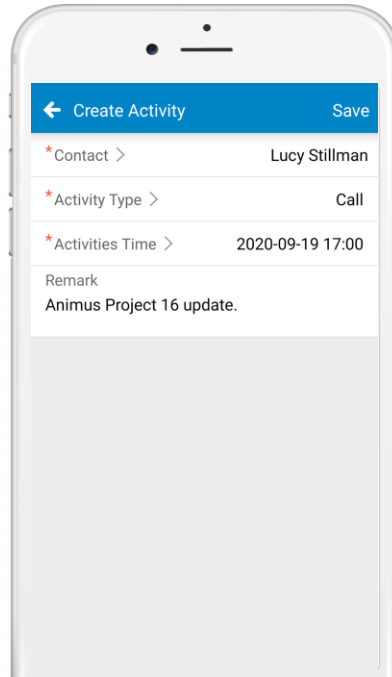


## 3.13 Features ( Available functions are dependent on member tool role )

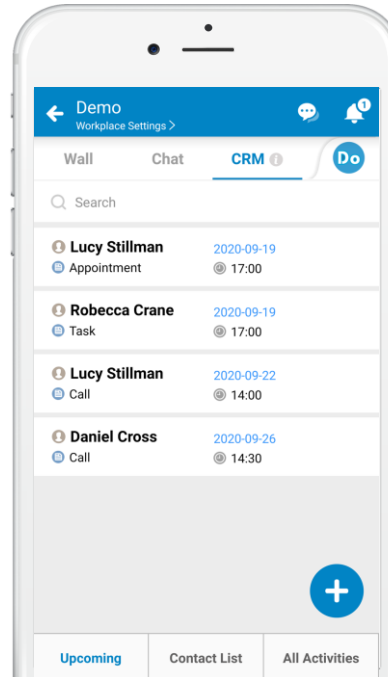
### Contact List



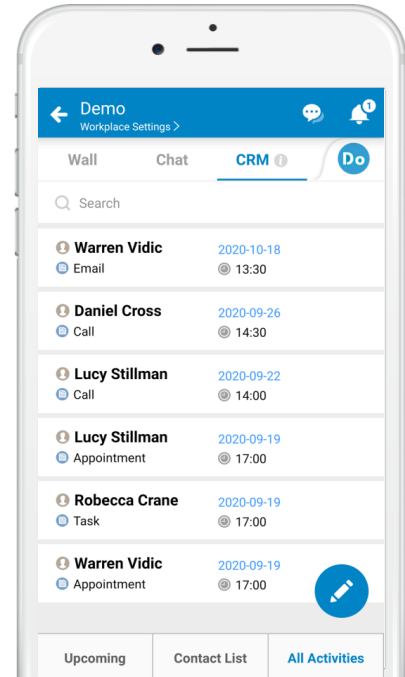
### Create Activity



### Upcoming



### All Activities





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in 5 steps

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How to use  
the basic tools?



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**Work smart !**



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