



WORKERLY

A ROBUST TEMP STAFFING SOLUTION FOR AGENCIES

Simplify and speed up your temp workforce management and empower them.



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Zoho Workerly is a platform built for temporary staffing agencies to help streamline their job scheduling processes. Agents can manage their client and temp databases, schedule jobs based on client requirements, generate timesheets and send out invoices -- all from within one interface.

Zoho Workerly helps with improving agent productivity by organizing temps, jobs, and clients while grouping them into personalized dashboards. This guides agents to assess openings and place temps faster.

Completely eliminate manual searches, as Zoho Workerly provides you with an automated list of matching temps for a job, so that you can schedule or reschedule jobs quickly. Not just that, send out invoices to clients with the built-in Zoho Books integration.



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ZOHO WORKERLY - FEATURES OVERVIEW



MANAGE TEMP, CLIENTS AND CONTACTS DATABASES.

De-clutter your database with a clean and simple view of your temps, their professional details, and their skill sets. Create profiles for your temps with custom dashboards to help you plan future jobs.

GET AN AUTOMATED LIST OF MATCHING TEMPS FOR YOUR JOBS.

Zoho Workerly's smart matching algorithm brings all the matching temps to your scheduling dashboard so you can choose the best option to complete your job within the timeframe.



CREATE SCHEDULES FOR TEMPS WITH ROSTER VIEW

Overcome the difficult maze of complex temp staffing issues such as overloading your temps, managing empty shifts, avoiding shift clashes etc. with Zoho Workerly's Roster View. Also, create bulk shifts and stay ahead in the game.



GENERATE TIMESHEETS, BE IT DAILY, WEEKLY OR MONTHLY.

Daily, weekly or monthly. Break down and build time sheets that fulfil your unique requirements, fixed along set billing timelines.

SEND OUT INVOICES FOR FASTER PAYMENTS.

Send invoices to clients with the built-in Zoho Books integration. Maintaining regular e-timesheets helps you manage payments to temps up to date.



GET REAL-TIME INSIGHTS.

Strategize your process with a set of pre-bundled reports and dashboards. Measure the performance of your agents, the progress of your assigned jobs, pending jobs and more to measure and fine-tune your existing strategies.



TEMP PORTAL

An all-in-one platform for temps to keep a track of jobs offered to them and also view their current, upcoming and completed projects. Temps can also mark their unavailability for shifts through this portal.

COMMUNICATION THAT WORKS.

Send bulk messages or emails to your clients and temps informing them of updates related to jobs assigned to them. Integrations with several third party vendors enables you to get consent from them for new job allocations.





WORKING WITH TEMPS

While the terminology with respect to Temps may differ for different organizations -- like workers, contract staff or others, the basic temp management process remains the same. The **Temps** module in Zoho Workerly has been designed to help you manage and empower your temp workforce better.

The Temps detail page in Zoho Workerly would give you a complete profile of the worker, along with the company (client) he is currently working for and his/her job details. However, what impacts the success or failure of your strategies would heavily rely upon the staffing department's approach to managing temps.



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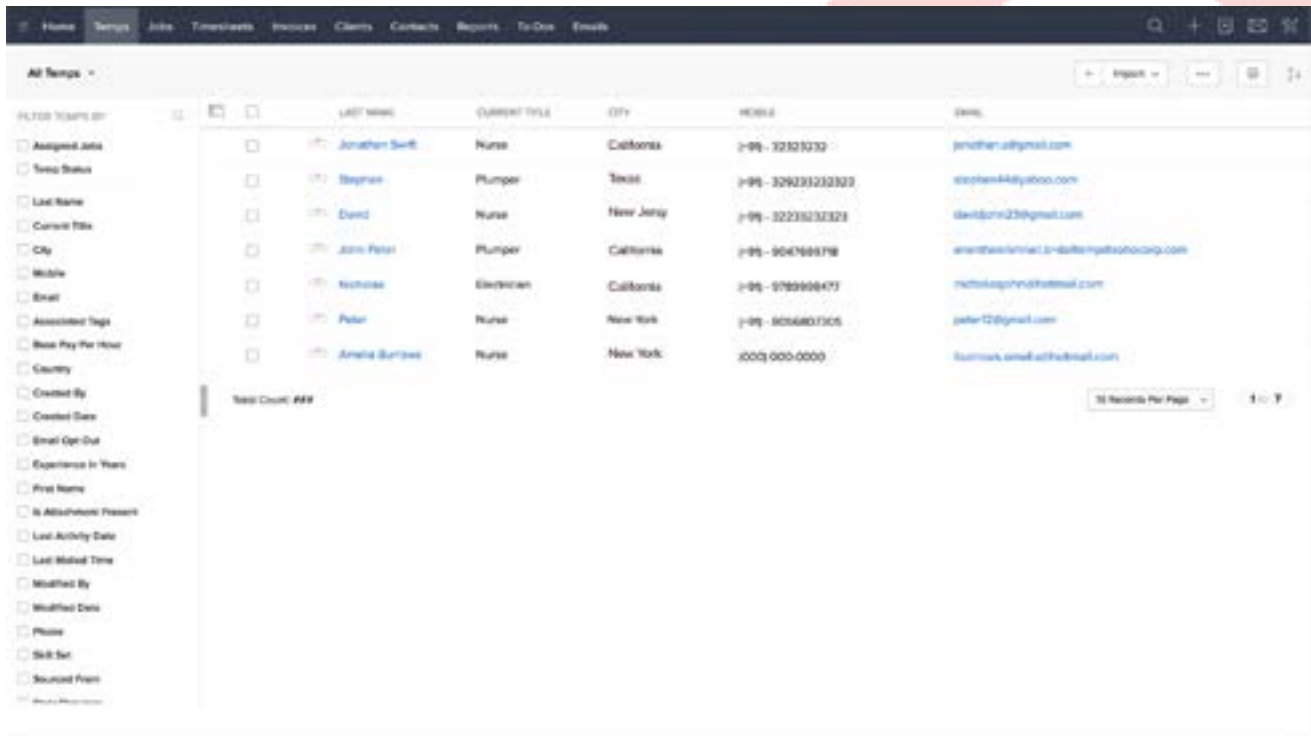
MANAGING YOUR TEMPORARY WORKFORCE

Customize [Temp](#) details according to your organization's staffing processes. Use the existing fields, disable some of the standard fields, change the order of the fields and sections or add new custom fields.

Add temps into your account. Set up the temp generation process by using web forms to capture temps from your website, [import temps](#) or directly add them by completing the temp form.

Assign temps to the correct job manually or using the [assignment rules](#).

Manage the temps further in the Jobs module.



TEMPS HOME PAGE

Click the temps tab to view the temps homepage and perform the following operations:

The records are displayed in list views.

Define your own [custom views](#) as per your requirements. Some system defined list views are already available, such as unread temps, recently created temps, etc.

Mass delete the records by selecting the check boxes corresponding to the records and clicking on the delete button.

Mass email the temps by selecting the check boxes corresponding to the records and clicking on the send mail button.

Use the temps tools option to perform some [common operations](#) such as mass transfer, mass delete, set up job rules, etc.

Search temps by alphabet, by information, or by criteria.

Filter temps based on priorities using the [advanced filters](#).

Print the temps along with the necessary details.

Date	Start Time	End Time	Break Hours	Remarks	Total Hours
19/08/2018 (Tue)	09:30 AM	05:30 PM	0:30	None	07 hrs 30 mins
20/08/2018 (Wed)	09:30 AM	05:30 PM	0:30	None	07 hrs 30 mins
21/08/2018 (Thu)	09:30 AM	05:30 PM	0:30	None	07 hrs 30 mins
22/08/2018 (Fri)	09:30 AM	05:30 PM	0:30	None	07 hrs 30 mins
23/08/2018 (Sat)	09:30 AM	05:30 PM	0:30	None	07 hrs 30 mins
Total Hours:					37 hrs 30 mins

TIMESHEET MANAGEMENT

Alright, now you have created your temps and scheduled jobs for them. The next step in managing your temp workforce is creating timesheets.

Accurate tracking of work hours spent by each worker will ensure that there is harmony between all the important stakeholders involved -- agents, temps and the clients. Timesheets in Zoho Workerly makes it easy to monitor and manage the number of hours spent by each of your temps.

Timesheets help maintain time logs of temps, either on a daily, weekly or monthly basis. Temp workers can fill their timesheets, or it can be filled by the agents who assign them the job. Zoho Workerly is a great fit for all kinds of temporary recruitment agencies, irrespective of their size or industry.



Cloning can only be applied to jobs that are billed on a daily basis. You can find this field in the Jobs module.

CREATING A TIMESHEET

You can create timesheets from three different modules in Zoho Workerly: Timesheets, Jobs, and Temps. You can also import timesheets into Zoho Workerly.



To create a new timesheet:

- Go to the Timesheets tab and click the + icon.
- Select the Job Name that you want to create a timesheet for.
- Select a Temp Name. You can choose this from the list of temps who have been assigned to the selected job.
- Enter the date cycle that the temp will work from the drop down list.

Click Create.

Once you've created a timesheet for a single day, you can clone it for the rest of the month if a job is performed by a single temp for multiple days.



CREATE BULK TIMESHEETS

Creating bulk timesheets for your temp workers has never been easier. Rather than creating multiple timesheets for each temp, simply select the Job Name and the temps that you want to create bulk timesheets for.



You can create bulk timesheets for a single job, performed by multiple temps, on a particular day.

You can only log bulk timesheet entries during the last working day of the billing cycle.



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The screenshot displays the Zoho Books 'All Invoices' page. On the left, a list of invoices is shown with columns for Client Name, Invoice Number, Date, Amount, and Status. The right pane shows a detailed view of invoice #INV-000122. It includes a 'BILL TO' section with client and company details, a table of tasks, and a summary of totals. The 'Balance Due' is highlighted as \$2000.00.

Task & Description	Hours	Rate	Amount
1 Physiotherapy 27 Aug 2018 - 28 Aug 2018	30.00	70.00	2100.00
Sub Total			2100.00
Total			\$2000.00
Balance Due			\$2000.00

GENERATING INVOICE

Generate timely, professional invoices as and when a job is completed with the default Zoho Books integration.



Getting started with setting up your books integration with your account has three initial cases to be considered.

Generating an invoice:

- In the Job module, click the Invoice option in the left side of the screen.
- Enter the Client Name, Job, Billing Duration and click Create Invoice

Case 1

New to Zoho Books and Zoho Invoice

If you're new to Zoho Books and Zoho Invoice, the system will create an account for you as soon as you sign up for Zoho Workerly. Go to Setup > Extensions & APIs > Zoho and click Manage in the Zoho Books integration widget.

Case 2

Existing Zoho Books user

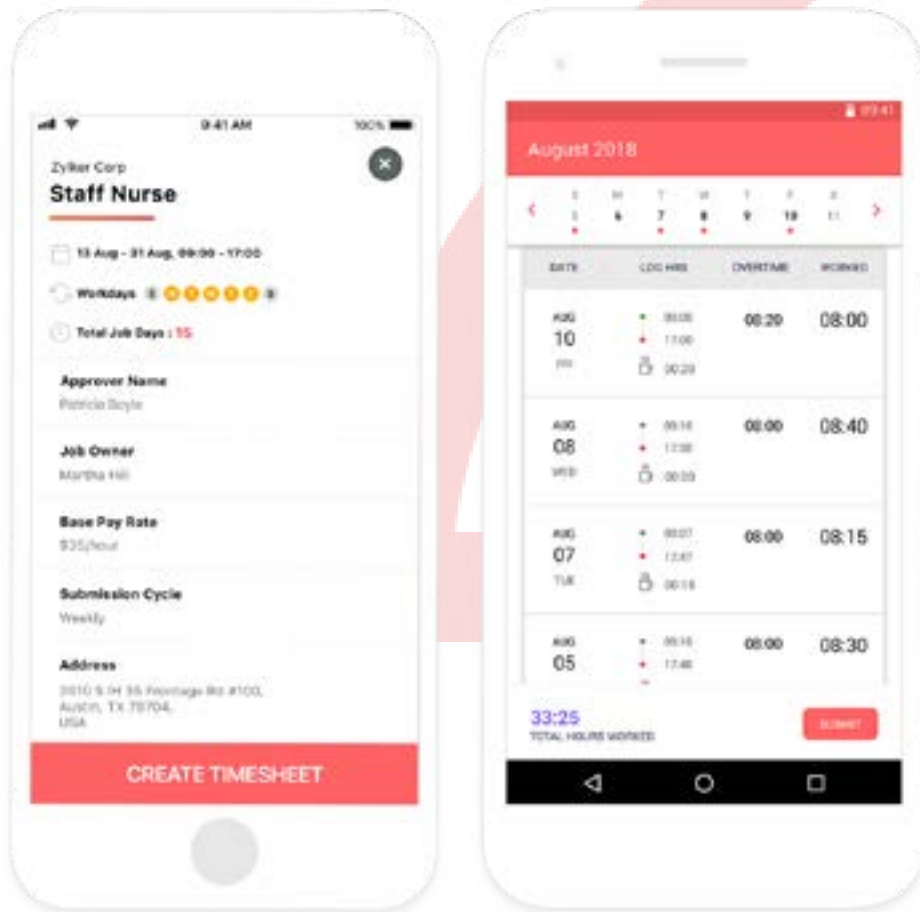
Navigate to the Setup page and configure the integration. You can set the user permission of all the agents in your account.

Case 3

Existing Zoho Invoice user

In this case, you'll have an option to convert to Zoho Books. To do this,

- Navigate to Setup > Extensions & APIs > Zoho. You'll be prompted to create an account in Zoho Books.
- Click Ok, and you'll be taken to the Zoho Invoice page where you can upgrade your account by moving all your organization data.



WORKERLY MOBILE APP

Zoho Workerly's mobile app empowers temps to update their job, clock their work hours, and to send timesheets for review.

They can also:

- View assigned jobs
- Accept/reject a job on the go
- Create and submit timesheets for approval
- View shift details and add their availability/unavailability in My Calendar



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INTEGRATIONS FOR BETTER TEMP SCHEDULING



Recruit



Sign



Books



Mail

Third-party



Adobe Sign



DocuSign



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SIMPLE PRICING. NO SURPRISES.

\$59

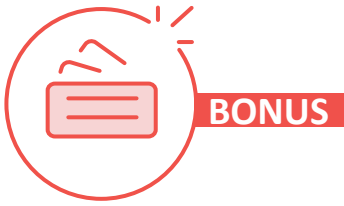
/50 Temps/Month

Add-On

TEMPS RANGE	PRICING(/PER TEMP)
51 to 500	\$1.5
above 500	\$0.75



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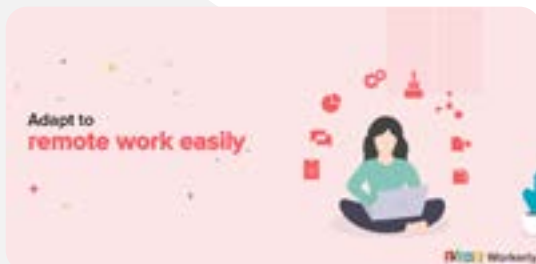


Accelerate Remote Temp Staffing with Zoho Workerly

Remote work has become the default mode of operation for businesses around the world due to the COVID-19 pandemic. As a result, the demand for temp work has increased dramatically. Clients have bigger expectations and want you to deliver the right talent to them quickly. If you need help with this, we've got you covered. Here at Zoho Workerly, we work towards ensuring that you and your team feel supported and are equipped to adapt to the rapid changes you may be experiencing.



Transitioning to remote temp staffing



Here are 5 must-try features in Zoho Workerly while remote staffing



Remote temp staffing with Zoho Workerly



Electronic timesheet management



Zoho Workerly Support

Zoho Workerly's team of experts are here to assist you with all your queries.

You can reach out to us at
support@zohoworkerly.com

We provide **24/5 Email support.**

Please do write to us on **support@zohoworkerly.com** if you wish to schedule a demo. Our team would be glad to run you down the product and its functionalities.



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For further details, visit
www.zoho.com/workerly