# User guide

EASY TO USE

**SOFTONE GO**
MOBILE APP

SoftO₁e®

# Hi!

**We are glad that you are one of the approximately 70,000 people who use our mobile app SoftOne GO.**

Our goal is to make your experience in the app as smooth and simple as possible. We're working hard to give you a digital work tool with cutting-edge technology that simplifies your everyday life, regardless of whether you use the app as an employee or as a manager for various functions within your operations.

We created this brochure to give you an overview of the app's features. We have also included other useful tips and information to support you in your work. Welcome to SoftOne GO!

Sincerely,
The team at SoftOne

**Do you have questions?**

Then contact your company's SoftOne GO SuperUsers. They are the point of contact between your business and SoftOne's Service & Quality department. They are trained in SoftOne GO and field questions from the entire business. In this way, they build up great system competence, and we hope that they can help you. If they need assistance in answering your question, our Product Specialists are ready to help them!

The functions and permissions you have in the app are governed by your company's policy and system setup. We update the mobile app on a regular basis. You can read about updated functionality from SoftOne here in the app, under "Information" .

**Make your voice heard in development of tools for the future**

We want to ensure that the mobile app is as good as possible. As a SoftOne GO mobile app user, you can make a difference with your valuable knowledge. Want to get involved and influence the development of app functions and design? Your SuperUsers can send requests for changes and new functionality to SoftOne. You are also welcome to join our reference group, which meets digitally twice a year.

Register your interest through mobilapp@softone.se.

**Together, we create the work tools of the future!**

1. Download the app

2. Open the activation e-mail

3. Log in

You now have access to an easier workday!

# Get started 1.

### ■ DOWNLOAD THE APP
Download the app to your phone. The app is called SoftOne GO and can be downloaded from Google Play or the App Store.

### ■ OPEN THE ACTIVATION E-MAIL
As a new user of SoftOne GO, you will receive an activation e-mail. SoftOne sends this e-mail to your e-mail address. The e-mail contains a link to a registration page called New User. On this page, you must enter your username and password.

The activation e-mail is sent to the e-mail address specified as the contact information for you in SoftOne GO. Your company's SuperUsers know which address is associated with you as a user.

### ■ SIGN IN
To log in, open the app on your phone. Use the login details that were described in your activation e-mail. Usually a username consists of your employee number followed by the @ symbol and your company's contract number at SoftOne. Example: 12345@1000.

### SSO
If you use SSO (Single Sign-On), your company's SuperUsers will give you information about your login credentials. It is common for your e-mail address to be used as a username, without a password, when logging in to SoftOne GO. Through SSO, you are already a verified user.

### ▶ STARTUP
Start by choosing the page that you want to have as your home page. This page will open automatically the next time you log in to the app. You can always switch to another home page later.

After saving, click on the three lines in the upper left corner to select other pages. The pages and functions that are displayed depends on which permissions you have as a user, and the role for which you are logged in..

**The SoftOne® GO App is available for iOS and Android.**
Android: 4.1 or later.
iPhone/iPad (iOS): 11.0 or later.

GET IT ON Google Play

Download on the App Store

# For an employee who ...

# Reports on order

**2.**

## ORDER REGISTRATION

The Order page shows all orders associated with you. If you have many orders, use the search function to find the correct order. You can search using any field that you know distinguishes the order from others, such as marking or internal text. Create a new order by tapping the plus sign at the upper right.

When you create a new order, you can enter a label to describe what the work refers to. If your customer is already entered in the system, choose the customer to which the order applies. After selecting the customer, tap Create to see an overview of your order and to start registering time and items.

## ORDER TEMPLATE

An order template can contain almost all the information in an order. Users with permission to do so can create order templates in SoftOne GO's web application. All app users of the app use previously posted order templates.

## TIME REGISTRATION

Register time on the order by tapping the plus sign near Time reporting on an order. In the view that opens, enter your worked time. Make sure you have entered the correct date! In the field for External listing, the activities you completed for the customer. Remember that customers will see this text on their invoices.

If the Billing time field is not filled in automatically, enter your hours. If your company has specified that SoftOne GO should do so, the field will be filled in automatically.

### Extended time registration

If the time worked on the order is also part of your salary basis, you need to enter information about your compensation and what the customer will be charged for. In the Reason field, indicate the time type: normal working time (default), absence, travel time, or overtime for which you are to be compensated.

## ITEMS

To register items that belong to the order, tap the plus sign to the left of Items. This is where you add items such as materials that you have retrieved from the vehicle. If your company uses EDI, all materials that you purchased from wholesalers will be added automatically to the order.

## EXPENSES

Register the expenses that belong to the order and specify whether these expenses are to be invoiced to the customer. The expense types available for selection correspond to your company's guidelines. If you choose to add an external post, it may be included on the customer's invoice.

## CHECKLISTS

Under the plus sign for Checklists, you will find the self-check routine and can sign off on it. You can also add more checklists. The settings in SoftOne GO control whether a checklist is linked to your order by default. If you have questions about this, ask your SuperUser.

## IMAGES AND FILES

You can attach images to an order. These can be images showing the results of the work, or something that is important to show to the customer or invoice issuer. You can add your own comment with the image.

Only image files from the phone camera / gallery can be attached. However, it is possible to open files in other formats that have been attached through SoftOne GO's web application.

## ORDER PLANNING

The My schedule page displays planning for a day or the whole week. Click on a day to see information about the day's assignment in the form of order number, customer, and assignment type. When you click on an assignment, you can choose to display the order or edit the assignment. On the Schedule page, you can also see the planning for your colleagues.

## ROT / RUT / GREEN TECHNOLOGY

If you need to register a tax deduction on an order for a private individual, the information basis for the deduction can be registered on the order. It is important that all hours are registered on the order before the information for ROT / RUT or Green Technology is entered. The deduction amount is calculated automatically. When the order is saved, an item row is generated for the deduction, along with an associated text row.

## SHOW ON MAP

The delivery address for the order can be displayed in Google Maps so it is easy to find the job location.

## MARK AS COMPLETED

When all materials and hours are registered on the order, check to ensure that everything is correct. You can mark individual item rows or the entire order as completed. When all item rows are marked, the order receives the status "Completed". This indicates that the order is ready for invoicing. The order will be reviewed before it is invoiced to the customer.

## ▇ TIME REPORT

Your time report gives you a good overview of orders and your time worked. You can view each order and the hours that you have registered. If you want to add hours to an order, tap the plus sign at the upper right to select the correct order. The time report is always displayed per week.

Use the arrows to scroll forward or backward in time. Change the day by clicking on the respective date.

## ▇ CUSTOMERS

You can add new customers to the app on the Customers page. You can search for a specific customer among those entered in the app. To add a new customer, click on the plus sign at the upper right.

## For an employee who ...

# Reports according to schedule

### BASIC SCHEDULE

The basic schedule shows your weekly working hours according your employment and your schedule cycle, without changes to adjust for calendar months and e.g. holidays.

### PLANNED SCHEDULE

Your scheduled time can be displayed in a day view, week view, or month view. Free shifts that you can queue for are displayed at the top of the view. If your company has given you access, you will be able to see your colleagues' schedules in the same view. You can also display your planned shifts in a shift flow.

The plus sign at the upper right gives you direct links, for example to leave requests, absence notification, or notification of availability. The symbol next to the plus sign gives you access to a filter for selecting the sorting order and other settings. The schedule uses yellow, red and orange markings. Explanations for the different symbols can be found under the question mark at the upper right.

### MY TIME

Your performed working time is displayed on the My time page. The time is displayed in hours and minutes. Breaks are shown in parentheses. Many companies use the term Approved time; this is the time that is ready to be reported to Payroll. Click on a day to see both the scheduled and completed times for the day.

#### Change working time

If you have not worked the same hours as your planned working hours, you can change the time you started or stopped working. You can also change the length of a break you had during the day.

### ABSENCE AND EXTRA WORKING TIME

#### Report extra time worked

Work outside regular working hours is registered as extra working time. Indicate the interval for your extra working time and the reason.

You can add an explanatory note for the extra time worked. The policies and regulations set out in SoftOne GO for your company will determine the reasons available for selection and whether or not you must add an explanatory note.

#### Report your absence

Absence can be registered for a whole day or part of a day. Indicate the time you were absent and the reason for the absence. The regulations for your employment determine the reasons available for selection.

#### Report absence

Use an absence report to register absence for your own illness or care of a sick child, for a maximum of 2 days in advance. An absence report means that the planning will indicate that your planned shift needs a substitute.

In this way, your colleagues can queue to work your shift, and staffing can achieve smooth and fast absence management. Companies often have a policy requiring employees to e-mail or phone their manager regarding absence, in addition to reporting absence in SoftOne GO. Absence is indicated by a red mark in your schedule and your time report.

#### Remove deviations

Use this function to remove changes for the day in question, regardless of whether they are for extra time or absence. Removal restores the working time to match the planned schedule time. The function can be found on your My time page.

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## MARK YOUR TIME AS COMPLETED

Once you have reviewed your salary basis for a specific month, you can mark the days of that month as completed. This can be done per day or for a month at a time. Use "My time overview" to mark the entire period as completed. Companies have different policies for whether or not time should be marked as completed, and may use other terms than "Completed". Days that are not marked as completed are usually shown in red.

## WOULD YOU LIKE TO WORK MORE?

**Availability**

You can enter dates and times that you are available to work extra hours, so that staffing can see this in their planning. You can enter times for when you can work and when you cannot work.

Availability can be specified both for full days or parts of days. Green indicates that you want to work more, while red indicates that you cannot work extra. Tap the plus sign in schedule planning and use the Report Availability page.

**Free shifts**

Available shifts are displayed at the top of the schedule. You can sign up and queue to work a free shift. Tap the shift row and report that you want to take this shift in the schedule planning.

Staffing will now see that you want to take this shift as extra working time. If the shift is assigned to you, you will receive a GO Mail notification, and the shift will be added to your schedule.

**Shift request**

You can receive shift requests from your staffing administrator. Any shift requests sent to you will appear in your GO Mail inbox. Shift requests are sent when shifts require substitutes. One and the same request can be sent to several different people at the same time. The first person to accept the request will have the shift moved to their schedule.

## WHO IS PRESENT?

The attendance schedule shows the colleagues that are present at work. This is mainly used by companies that register working hours in attendance; employees report working time according to when they start and stop working.

# Navigation

Tap directly on days and dates or use the arrows to scroll backward or forward in the period. In the Settings page, you can select a page as your home page.

## For an employee who ...

# Reports only deviations ...

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### ▪ PLANNED WORKING TIME

Your planned working time can be displayed in a day view, weekly view or monthly view. If your company has given you access, you will be able to see your colleagues' working times in the same view. You can also display your planned working hours in a shift flow.

The plus sign at the upper right gives you direct links, for example to leave requests. The symbol next to the plus sign gives you access to a filter for selecting the sorting order and other settings. The schedule uses yellow, red and orange markings. Explanations for the different symbols can be found under the question mark at the upper right.

### ▪ WORK HOURS PERFORMED

Your performed working time is displayed on the My time page. The time is displayed in hours and minutes. Breaks are shown in parentheses. Many companies use the term Approved time; this is the time that is ready to be reported to Payroll. Tap a day to see both the scheduled and completed times for the day.

#### Change working time

If you have not worked the same hours as your planned working hours, you can change the time you started or stopped working. You can also change the length of a break you had during the day.

### ▪ ABSENCE AND EXTRA WORKING TIME

#### Report extra workingtime

Work outside regular working hours is registered as extra working time. Indicate the interval for your extra working time and the reason.

You can add an explanatory note for the extra time worked. The policies and regulations set out in SoftOne GO for your company will determine the reasons available for selection and whether or not you must add an explanatory note.

#### Report your absence

Absence can be registered for a whole day or part of a day. Indicate the time you were absent and the reason for the absence. The regulations for your employment determine the reasons available for selection.

#### Remove deviations

Use this function to remove changes for the day in question, regardless of whether they are for extra time or absence. Removal restores the working time to match the planned schedule time. The function can be found on your My time page.

### ▪ MARK YOUR TIME AS COMPLETED

Once you have entered your deviations for the month, mark the days as completed to show that you have finished reporting. Your manager will see that you are finished with your salary basis, and the manager can then approve your deviations before your salary for the period is calculated.

Use "My time overview" to mark the entire period as completed. Days that have not been marked as completed are usually shown in red, while already marked days are usually shown in blue. Different companies may use different colors for these.

In the overview, you can also submit leave requests and enter days that you have been absent.
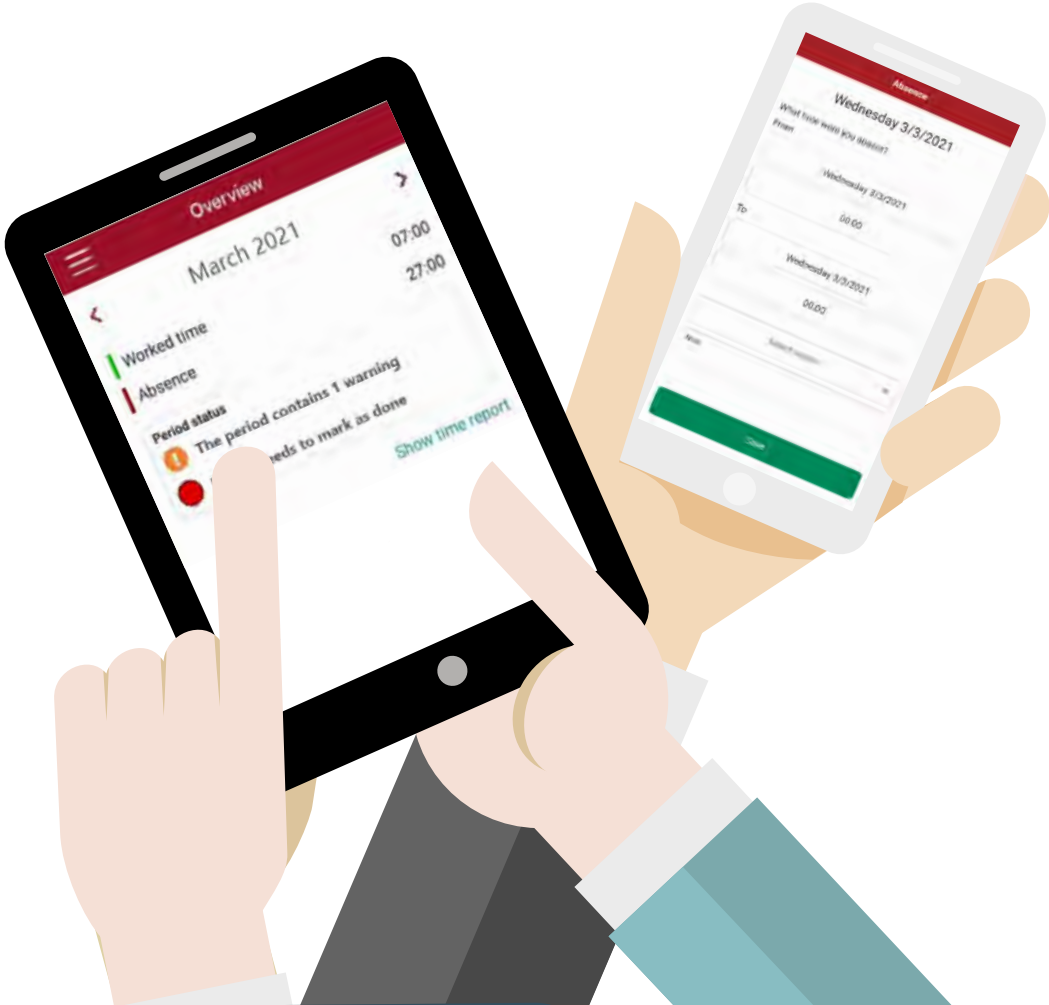
## Navigation

Tap directly on days and dates or use the arrows to scroll backward or forward in the period. In the Settings page, you can select a page as your home page.

# For you as an employee ...

### APPLY FOR LEAVE

As a user, you can create new leave requests and see the status of your submitted requests. Leave requests can be for both longer date intervals or for a few hours. The reasons for leave that you can select and fields that you can edit will depend on your company's settings in SoftOne GO.

Common reasons that can be selected include vacation, parental leave, and leave of absence. Some causes can be used only for full days, while others can be used for a part of a day. You can also include a comment to the person who handles leave requests. The days for which you have requested leave will be marked in your schedule with a red dot.

When a leave request has been processed by staffing, you will receive a GO Mail. Leave requests can be granted or rejected. If your request is for a longer date interval, some days may be granted and others rejected.

### YOUR SALARY

To access to your salary specification, you need to log in again, for security reasons. The salary specifications page shows both your most recent and previous payments.

### BALANCE

Your current balances, for vacation, flex time, and overtime, for example, can be found here. The balances shown are related to your collective agreement and the agreements that apply to your employment. The balance for break time shows how much break time is left to take for the day. If you don't see a balance or want to know more about the information shown here, ask your GO SuperUsers.

### COLLEAGUES

The app contains a list with contact information for your colleagues in your company. By tapping in the list on a colleague's name, you can access several different communication paths for each colleague, such as a phone number or e-mail address. You can search and sort by different tasks in the list to find the right colleague.

# For those responsible for ...

### ■ ORDER PLANNING

Planning personnel can see the relevant employees who are scheduled to work, in a day view or weekly view. Exactly which employees are displayed here will depend on the permissions attached to your user and role. If you look at today's date in the day view, you will see the current time as a dashed line. Absence can be shown in red in the planning.

Various functions for this view can be found below the dots at the upper right. One example is a function for creating new work shifts and inserting them in the planning.
The filter icon is located to the left of the dots. You determine your own filter settings, such as sorting order and selection of displayed assignment types, as well as selection of employees to be displayed.

The weekly view will display red markings on dates for which leave has been requested.

### ■ PLANNED ORDER

Tap a day to see details in the planning. The menu will give you several different choices..

### Today's planning

When you click on a day for an employee in the order planning, you can see the day's planned working hours and planned orders for that employee.

### View orders

Click on an order to see the details of the assignment. The information displayed includes the order number, customer and assignment type.

# Navigation

Tap directly on days and dates or use the arrows to scroll backward or forward in the period. In the Settings page, you can select a page as your home page.

# For those responsible for ...

## ▉ PLANNED STAFFING

If you are responsible for staffing, you can see a day or weekly view of employees in your group who are planned to work according to the schedule. Exactly which employees are displayed here will depend on the permissions attached to your user and role. The Free shifts row at the top of the view shows shifts that need to be filled.

If you look at today's date in the day view, you will see the current time as a dashed line. Absence in the planning is shown in red for the shift type.

Various functions for this view can be found below the dots at the upper right. One example is a function for creating new work shifts and inserting them in the schedule. The filter icon is located to the left of the dots. You determine your own filter settings, such as sorting order and selection of displayed shift types, as well as selection of employees to be displayed.

The weekly view shows yellow, red and orange markings for desired shifts or leave requests.

## ▉ CHANGES IN STAFFING

Click on a day to make changes to the schedule. The menu will give you several different choices.

### Free shifts

Free shifts are shown in the row at the top of the schedule. A yellow marking next to a free shift shows you that employees have queued to take that shift. To see the employees in the queue, click on the shift and then select the menu option See queue. If you want to assign the shift to one of these employees, click on the employee's name. If the employee does not have competence for the shift, or if assigning this shift would

breach the company's working time rules, the app will warn you.

Once a free shift is assigned, the shift is automatically moved from the Free shifts row to the employee's schedule row. The employee will then see this shift in their schedule view. All employees who have queued for the shift will receive a GO Mail explaining that the shift has been assigned.

### Shift request

If you have a work shift that needs to be filled, you can send out a Shift request. A Shift request is sent as a GO Mail to selected employees. The first employee to accept the request will automatically receive the shift for their schedule.

To create a Shift request, click on the shift and select Send Shift request in the menu. You can choose to sort employees based on shift type, skills, working time rules and displayed availability. Before you send your Shift request, you can choose to write a note to send to the selected employees.

### New shift

You can use the symbol at the upper right of the schedule to add a new shift. You can also choose to click directly on an empty day in the schedule. Select the date and specify the shift start and end times.

You can mark a shift as an extra shift or temporary position, if this is relevant in your company. Click on the shift type to select the desired shift type.

Select this schedule type only if the shift is to be calculated as e.g. additional time or with extra responsibility pay. If the work shift is to contain several different types of shifts or breaks, click ▼

the plus sign at the upper right to add these.

After the shift is created, you must select the correct employee before you can save.

**Edit shift**

Click on a day in the schedule; a menu is displayed where you can select editing of the shift. You can edit everything you choose in the same way as when you create a new shift in the app, e.g. add breaks, change times or change shift types.

**Delete shift**

Tap the shift that you want to delete. Select Delete from the menu. The app will ask whether you want to delete only the selected shift or all connected shifts. You can also choose to cancel the deletion.

## Navigation

Tap directly on days and dates or use the arrows to scroll backward or forward in the period. In the Settings page, you can select a page as your home page.
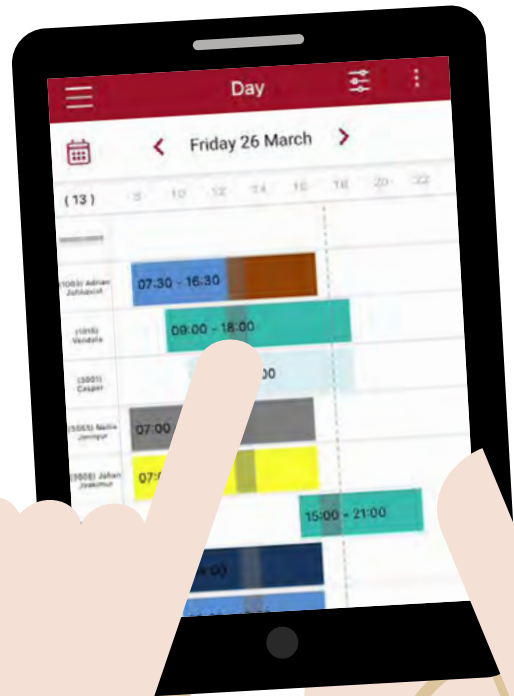
# For those responsible for ...

### LEAVE REQUESTS

You will find your employees' leave requests on the Approve leave page. You can approve or reject a leave request. If the request is for multiple days, you can approve or reject one day at a time.

If a substitute will replace the employee during absence, you can choose the substitute employee at the same time that you process the request. The pass will then be added automatically to the substitute's schedule. You can also choose to display a work shift in the request as a Free shift in the schedule planning. Other employees can queue to take the Free shift in the schedule planning.

Employees will receive a GO Mail to inform them as whether their request has been approved or rejected.

### INVOICE APPROVAL

If you are responsible for invoice approval, you can choose to receive a message and a notification in SoftOne GO as soon as a new invoice needs to be approved. The user who registers an invoice upon receipt can specify whether to send an approval notification to relevant persons when the approval flow starts. It is also possible to specify notification per approval group.

The Invoice Approval page shows the invoices to be approved. Approve or reject the invoice by clicking on the desired invoice. You can also write a comment if needed. If you choose to reject the invoice, you must always add an explanation for the rejection.

### APPROVE TIME REPORTS

If you have employees who usually work according to the planned working hours and register few deviations, you can use the approval overview. The certificate overview is used mostly when the employees register only their deviations, which is common practice among salaried employees, for example.

The period shown and the names of approval levels are related to how SoftOne GO is set up for your company.

Days that need approval are often in shown red or blue. You can approve employees' times directly in the overview, or tap on an employee to see times per day for the month in more detail.

### ADMINISTRATIVE MODE

The "How's it going?" page shows administrators items such as open quotes and orders, unpaid invoices and overdue payments.

# Communicate more through ...

## ■ GO MAIL

GO Mail is an internal mail function in SoftOne GO. It is possible to have this type of e-mail forwarded to another, external e-mail address if you wish.

GO Mail can be used to communicate directly with your colleagues in the app. E-mails can be created or read in SoftOne GO's web application.

GO Mail can be created automatically by SoftOne GO's functions. The settings in SoftOne determine the types of e-mails that a user receives. Contact your company's SuperUser if you have any questions about this. An example of automatic GO Mail is when changes are made to your personal information in SoftOne GO. Various forms of "To Complete" and "To Approve" reminders can also be sent.

The app menu notifies you about new, unread GO Mail messages. The number of mails is displayed in the menu.

In this e-mail function, you can create, reply to and delete e-mails. Received-mails are sorted into an inbox, and sent e-mails can be found in a separate tab next to the inbox. To create a new e-mail, tap the plus sign at the upper right. When you write a new e-mail, you can use the search function to find the correct recipient within your company. You can send an e-mail to multiple recipients at the same time.

## ■ INFORMATION

SoftOne GO is used to send information within or to your company. The information can be internal, regarding such matters as meetings or inventory, or simply contain information previously posted on notice boards, sent as a letter, or only via e-mail.

All new information is posted on the New Information page. The app menu notifies you about new, unread information. The number of notifications is displayed in the menu. Once you have read the information, it will be posted on the Internal page if it is issued by your own company. SoftOne will send you information that is important to read for your user role. Information explains new functions or rule changes, for example.

Messages with internal information are created in SoftOne GO's web application. Only users with the correct permissions can do this. The information can be displayed for date range or only for certain users, and can also be sent as a push notification.

## ■ DOCUMENTS

Documents that your company wants to share can be found here. Documents that are available to multiple users can be found under the General tab, while your personal employee documents can be found under the My tab.

Examples of general documents include personnel policies; a personal document could be your employment certificate. Names of unread documents are displayed in bold text. The app menu notifies you about new, unread documents. The number of new documents is displayed in the menu.

## Read and understood

Mail, information, and documents can all be marked with the requirement that as a user, you must confirm that you have read and understood the information that has been sent.

# Learn more ...

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## SETTINGS
On the Settings page, you can make your own personal settings for the app.

### ■ HOME PAGE
You can choose the page you want as the start page in the app. In the Settings page, select "Change home page". Highlight the page you want as the home page; then tap Save.

After saving, click on the three lines in the upper left corner to select other pages. The pages and functions that are displayed will depend on your user permissions and the role for which you are logged in.

### ■ CONTACT INFORMATION
Fill in your personal information and be sure to update your details if they change. Doing so ensures that your manager and the company always have up-to-date information. SuperUsers of GO will inform you about your company's procedures; for example, information about next of kin can be important, should something should happen to you while you are at work.

### ■ COMPANY AND ROLE
As a user of the app, you can have several roles with different responsibilities and permissions. For example, you can have both an employee role and a responsibility role for e.g. invoice or time reporting approval for other staff.

In Settings, you can change a company or role. You can also change a company or role directly in the menu by tapping on the company name, or role name at the lower left in the menu.

### ■ USER SETTINGS
As a user, you can have personal settings for various functions in the app. General settings that you can change can be found here. An example is a function that lets part-time or hourly employees register interest in taking extra shifts. If you select this setting, you will be placed at the top of the list for substitutes and staffing of free shifts.

### ■ CHANGE ACCOUNT
Companies with a group organization, where users such as regional managers need to switch between regions, can do that here. For example, a manager who is responsible for several different stores can change to another store on this page.

### ■ LOG OUT
Tapping Log out will take you to the login page for the app. If you log out from the app completely, you will not be able to receive any push notifications from SoftOne GO.

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