



**Institute of Certified
Bookkeepers
Software Review**

2016

Deputy

Company Background

Deputy was founded by Steve Shelley and Ashik Ahmed in 2008 in Sydney, Australia. They currently have offices in the USA with their headquarters in Sydney. Deputy has had a physical presence in the UK for the past 7-8 months which has seen the UK market grow by more than 120% to date. In the UK, Deputy currently has over 11,000 clients worldwide and over 270,000 users. Deputy's mission is:-

“To serve and protect business owners by making it easier to manage employees and perform related tasks, saving them time, and money so they can do the things they love. Deputy is the trusted and dependable second-in-charge.”

Steve Shelley formerly owned an Australian aviation services company employing 15-20 staff. He teamed up with Ashik Ahmed and designed an in-house system to schedule ground crews that they supplied to commercial airlines. Having the in-house software in place allowed Steve to grow his workforce to over 400 employees. The business was later sold allowing Steve and Ashik to pursue what is now known as Deputy.

Deputy utilises the full social media experience to gain current and potential customer attention. Having reviewed their social media sites I was pleased to see recent posts and a relatively high frequency of their posts across Facebook, Twitter and LinkedIn. The website <https://www.deputy.com/> is visually easy to read and you quickly understand the service on offer. It uses a good mixture of text and images. It is easy to navigate and very quickly you can see where to login/join up.

The Product

Deputy provides an end-to-end solution for managing a workforce, from employee scheduling to payroll integration. Being 100% cloud-based you are able to roster your employees using the web or mobile app which will publish to staff via email/sms/push-notification their shifts. Employees can clock in and out using the Deputy mobile app on their own device, with built-in geo-location recording. Alternatively, they can use the Deputy Kiosk iPad app with their own PIN code to clock in and out. If desired by the employer, face detection can be enabled when using the iPad app. Once shifts are completed approved timesheets can be transferred seamlessly via API to a cloud-based payroll solution.

On initially speaking with Deputy I was given a live on-line demo where I was taken through the software and the functionality it has to offer. This was useful in getting to know how the system worked and what it was capable of.

Set-Up

Setting up an initial account with Deputy was very quick and I was straight into the system after providing just a name and email address. I was then prompted to select either a template account from a choice of six pre-prepared businesses or set up from scratch. I choose the later. I was then asked for the business name and location and then taken through to other options asking for business industry, number of employees, my job title and contact number. You then start a step-by-step walk through of setting up Deputy. I chose to skip this and get started on my own at which point I was taken through to the “Me” homepage. The “Me” homepage shows you your upcoming shifts for the next week and enables you to request time off.

The first aspect I wanted to set up was the various locations of the business, i.e. a multiple site business. This was easy and quick to do and as part of this function, later down the line, it shows employees on a map where they will be working, with an option to add notes regarding travel and car parking arrangements. Within each location you can add different departments if required, such as Kitchen, Reception, Bar, etc. You can also add specific training requirements to each department such as “Must be over 18” if working within the bar. You can set up specific details within each location, such as opening and closing times, shift and break durations. These of course can be overridden at a later date when setting your schedules. This function also gives you many more options to decide on how different aspects of the software should be dealt with. These include allowing employees to swap shifts, with or without management approval, rounding shift start and finish times and requiring photo capture of employees when clocking in and out (if using the kiosk iPad app). Once you have made your choices you can then connect each location with a payroll software which pulls across all information of those employees you’ve selected. The number of locations and departments within those you can have in the system is unlimited.

The next function to set up was the employees however most of this had been done when I set up the various locations by syncing the employee information with the payroll software. When you select an employee you are shown information regarding DOB, email address and mobile number. It also details information regarding the upcoming shifts that employee is scheduled to work, recently submitted timesheets, dates the employee is unavailable to work and submitted leave requests. From this screen you are able to directly schedule the employee a shift, assign a task, send a message or write a journal.

The journal function is a useful tool for recording notes regarding the employee such as “great comments from a customer”, “didn’t meet targets”, “failed to complete set tasks and didn’t communicate this to shift leader”. These journal entries provide a great auditable history to base discussions on at a later date, such as at an appraisal or disciplinary meeting. You are able to add/edit information regarding the employee. The bulk of the employee information is pulled through from your payroll software including email address, mobile number, DOB and start date. However there are some field Deputy does not capture such as address and emergency contact details. Within this screen you are able to set the access level (to Deputy) and something titled “Stress Profile”. This would be used for setting the number of hours an employee is allowed to work i.e. 20 hrs per week for a student, standard 40 hrs, 24/7, etc. It is recommended by Deputy, that when editing employee information that is also contained with the payroll software that the edit is

done directly within the payroll software itself and then synced across to Deputy. From the main “People” home page you can manage employees by using the “bulk action” button. This can be used for adding locations, stress profiles, completed training courses and pay rates to employee’s profiles. You can also send selected employees invites to download the Deputy app and messages.

Once your “People” (employees) and “Locations” have set up you are then ready to start using Deputy to its fullest.

News Feed

The news feed function enables employers to communicate with some or all of their employees. It works in a similar way to Facebook, you can post messages, upload load pictures and PDF files and employees are able to comment/reply to posts. You can opt to track communications and see who has seen the post which provides businesses with a great auditable tool when using the system for training, announcements etc.

Tasks

This gives all users the ability to set/assign tasks, either to themselves or other employees. Entering a task is very straightforward, title, who to assign the task to, if not for yourself, the date it must be completed by and any notes to accompany the task. Employees will receive notifications via the app when a task is assigned to them. Once completed and marked as completed the manager will receive a notification to confirm.

Schedule

From all the functions within Deputy scheduling really is the pivotal feature. Here companies can set up rosters easily and quickly communicate these with employees.

The process of scheduling is a very simple drag and drop system. You can schedule day by day or a week at a time. When you go onto the “Schedule” homepage you are shown a view of the current week, broken down by locations together with a list of employees. You then simply click on the employee of choice and drag them to the day and location of when you’d like them to work. The system will automatically schedule them to work as per the default shift times that were input when each location was set up during the initially stages. As mentioned then these times can be overridden. If you try to schedule an employee to work during a period for which they have been approved leave, you will be prompted by an error informing you that they are on leave. You can also add “open” shifts. These shifts when published will then be offered to other members of staff via email, SMS and smartphone notifications. Employees can then login to Deputy and claim the shift. The notifications regarding an “open” shift will not be sent to members of staff who are already scheduled to work or are on leave/unavailable that day. Once you have completed the schedule it needs to be published at which point notifications will be sent to all employees affected by the schedule. At any time, you can amend the schedule even after it has been published, you just need to remember to re-publish the revised schedule.

If a member of staff calls in sick or doesn’t arrive for a shift you can quickly and easily find a replacement. You simply double-click on the shift that requires filling and under “shift actions” select

“find a replacement”. You are then shown a list of available employees whom you can then invite to undertake the shift. It will show you members of staff that are on leave although it will display a message saying that person is on leave but you can still offer them the shift.

Timesheets

Timesheets can be created by an employee clocking on and off, a manager manually creating them, or automatically generated from the roster. An employee may also manually submit one, if the administrator has enabled the permission to do so.

Under the “Timesheets” header there is a drop down giving two options: 1, approve timesheets; 2, export timesheets. You can’t export unapproved timesheets so that’s where I started. I was shown a list of employees who had clocked in and out and by doing so had generated a timesheet. I was also shown employees, who during the period I had selected had been absent due to approved leave. Employees’ timesheets who are on pre-approved leave are automatically approved by the system. Approving a timesheet is very quick and straightforward. Simply click on the employees’ name and you’ll be shown a list of completed shifts detailing the start, finish and break times. If you need to amend any of the details on the timesheet you’re able to do so. You can override a submitted timesheet to match details of the shift times that were actually scheduled, and you can even completely discard a submitted timesheet.

Once you have amended, if required, and approved submitted timesheets they’re ready to be exported to your payroll software. You can choose to export all employees’ approved timesheets or just some of them. I selected to export all employees’. I was then shown details of all the timesheets for each employee as well as the total hours of all employees combined that I was about to export. With just one click of a button the selected approved timesheets were exported, in this case to Xero, and appeared in Xero as a draft payrun ready and waiting to be posted to the accounts, submitted to HMRC and payslips emailed out to employees.

Reports

There are a number of useful standard reports with Deputy which can only be accessed by system administrators and location managers. *Time Off & Schedules*, provides an overview of employees’ unavailability, leave and scheduled shifts across all locations over a selected period of time. *Employee Details*, provides basic information regarding employees and also details their activity within Deputy itself. *Journal Usage*, the overview shows the number of journals posted during a set period as well as the category of the journal. When you run the full report you can sort by various elements. You can also drill down into the report by clicking the employee’s name, you will then be shown all journal entries for that employee. *Rosters Vs. Timesheets Vs. Sales*, compare rostered hours against hours actually worked and the total sales taken (if using an API connected point of sale software). Finally, *Employee Timesheet Locations*, displays a map with coloured pins, of which each colour represents something different such as a shift started, finished or a shift was ended before or after the scheduled time.

Smart Phone App

Deputy offers a smart phone app for both iPhone and Android users. Via the app you are able to read announcements made via the news feed function, see and mark assigned tasks as complete and add comments, view scheduled shifts and who you'll be working with, apply for leave and of course clocking in and out. Once the app is downloaded and push notifications have been enabled you'll receive notifications when new/amended schedules have been published, new task assigned to you and when there's new news posts.

Kiosk iPad App

As it suggests the Kiosk app is currently only available for the iPad. It can be used at a central point within a business location for employees to clock in and out. Employees are given PIN codes to be able to clock in/out and if desired system administrators and location managers can choose for a picture to be taken of the employee at that time. Once employees have logged in they can also view assigned tasks, company announcements, create leave requests and submit unavailability notifications.

Benefits & Strengths

- ☺ Cloud-based, allowing access anywhere, anytime via any internet connected device.
- ☺ Apps available for Android, iOS and a kiosk app for the iPad.
- ☺ 1 month, without obligation free trial.
- ☺ Scheduling - simple drag & drop interface.
- ☺ Compliance - Filter staff on training and availability.
- ☺ Employee - Manage performance, communicate and engage.
- ☺ Tasking - Assign and Track tasks.
- ☺ Timesheets - Capture and approve timesheets.
- ☺ Reporting - track and review your data with widget & report.
- ☺ Leave - integrated approval & scheduling.
- ☺ Notifications - Email, SMS & push notifications.
- ☺ Employee portal - View shifts, tasks & leave/availability.
- ☺ Time clock - Use employee mobile as geo-locatable time clock.
- ☺ Payroll - Integrate with payroll software's in one click.

- ☺ Time clock - iPad kiosk with face detection.
- ☺ Communication - via email, push notification, sms 2-way.
- ☺ Payroll - Forecast your labour costs. (not including on-costs)
- ☺ Open Shift – Manage promptly no-shows/sick calls.
- ☺ Shift Confirmation - get your staff to confirm shifts.
- ☺ Calendar Sync - Outlook, iCal, Google Calendar, etc.
- ☺ Unlimited support 24/7 via the live-chat service.

Considerations & Weaknesses

- ☺ When setting-up/modifying locations it would be useful to have a bulk actions button, such as that within the “People” home page enabling selected options/preferences to be copied to other identified locations to increase speed, accuracy, and consistency.
- ☺ There is room for improvement with the offering that I tested. However much of this is available in the ‘Enterprise’ offering which is priced slightly higher.
 - Unfortunately, whilst you are able to assign tasks to individual employees you can’t assign tasks to multiple employees or to all employees within a set location. I feel it would be beneficial to assign tasks to an employee based on their job title, so that if you assigned a team leader a set task for completion and the team leader changed during that period then the task, if not completed would be automatically be assigned to the new job holder.
 - It would be good to see reminders about assigned tasks. If a task hasn’t been marked as completed the employee receives a reminder 1, 2, 5 or 7 days prior to the due date.
 - It would be useful to be able to set up reoccurring tasks, those that need to be completed on a daily, weekly, monthly or yearly basis.
 - Perhaps when marking a task as complete via a PC, although this function is available via the app, it would useful if you were able add notes/comments to the task that are then relayed to the manager upon completion.
- ☺ Whilst I feel the Kiosk app is good, the cost of an iPad purely for the purpose of running Deputy within a location is quite high. I feel it would be of value to many businesses to be able to set-up a dedicated PC within each location with the same interface as the iPad app. The PC could also be linked to a PC camera for image capturing.

- ☹️ One major issue I found was that as an administrator of Deputy I was automatically made an employee, both within Deputy and the integrated payroll software. An administrator in Deputy is not necessarily an employee, may be an external advisor, therefore I feel strongly that this element needs to be resolved urgently.
- ☹️ Schedules can be copied from previous weeks although it would be nice to see the ability to set-up repeating schedules that can then be amended as necessary.

Value for Money

Deputy offers 1 month's free trial and no credit/debit card information is requested when setting up the account. Prices start from 50p per employee, per month depending on the functions you wish to use.

<p>Starter If you just need to schedule your team</p> <p>50p /employee* /month</p> <p>Get started for free</p> <ul style="list-style-type: none"> • Scheduling • Announcements • Tasking • Unlimited 24/7 Support 	<p>Most popular</p> <p>Premium Perfect for most businesses</p> <p>£2 /employee* /month</p> <p>Get started for free</p> <ul style="list-style-type: none"> • Scheduling • Communication • Tasking • Timesheets • Payroll integration • Reports • Unlimited 24/7 Support 	<p>Enterprise Great for larger businesses</p> <p>Even more functionality with advanced payroll calculations, customizable employee permissions, powerful tasking features and enhanced reporting.</p> <p>Contact Us</p> <ul style="list-style-type: none"> • Scheduling and announcements • Tasking and timesheets • Payroll integration • Advanced award interpretation • 20 additional reports • Customize roles, permissions & extensions • Unlimited 24/7 Support
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They also offer a flexible pricing option to those companies that employ “seasonal” workers. This is charged at £1 per employee per week, however you are only charged for those employees that are scheduled to work and submit timesheets.

Deputy connects via API with various accounting packages including Xero, Quickbooks, MYOB and MyPAYE to name a few. With the functionality of one click you can submit approved timesheets which show as a draft payrun in your accounting package instantly which is a great time saving bonus.

Deputy also integrates with a number of point of sale and project billing software providers.

Testimonials

There are many favourable testimonials available to read via their website (<https://www.deputy.com/customers>). There are also many available from independent websites such as <https://www.getapp.com>, <http://uk.pcmag.com/>, and <https://community.xero.com/business/discussion/2209994/>.

Summary of Review

Whilst I consider the overall concept of the product is good I feel there is some room for development to enhance the product in relation to the points I've made under weaknesses and considerations.

The future does look very good for Deputy and its customers. The software is good, reasonably well priced and a customer centred focus that provides an all-round attractive product.

Deputy is a program that is very easy to understand, implement in the daily routine at work and use. It is easy to complete and to analyse the monthly schedules for staff, and to quickly find available staff when needed. At the same time, it's easy to keep the employees updated on eventual changes due to the notification option. The interface is very simple, practical and gives a good overview.

I have been very impressed with this product and can see that Deputy's presence in the UK market has every potential to grow.

Disclaimer

The Institute of Certified Bookkeepers having reviewed Deputy software package cannot be held responsible in any way for the actions of the company or their software. This review is merely an unbiased overview of the software package as at June 2016. Any enquiries should be directed to Deputy.