



AUTOMATEDMANAGER

## ABOUT US

Automated Manager was created 10 years ago as an in-house database for one of North America's largest dental practices located in Calgary, Alberta. With the direction of a new Office Manager reducing time consuming manual tasks such as; payroll calculations, staff scheduling, and reporting functions, was the number one priority. The Office Manager and the Owner of the dental practice hired a couple programmers to work with their ideas and develop a tool that would help them with the day to day operations of the office.

The creation of Automated Manager took place over a 4 year period. Gradually complexity was added over the following years such as combining payroll, scheduling and reporting functions per employee to determine true productivity levels, adding communication functions, task assignment, office manual, etc.

Automated Manager then paired itself with Dental Management Secrets, a consulting company based out of Calgary, Alberta geared towards dental offices. With this partnership Automated Manager increased its client base by, bringing new ideas and initiatives to the table.

As our companies grew we had noticed the demand for such a tool, in other industries outside the dental world. The functions that Automated Manager brings to the table can be utilized in any/all office settings. We are now expanding our horizons by introducing our software to other businesses and office across North America.

We want to thank you for taking the time to visit our website and invite you and your team to join our growing network of clients.

Thank you,



Dr. David Robertson

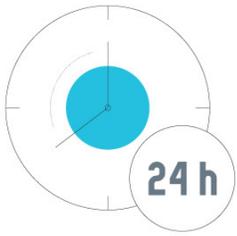
## WHAT DOES AUTOMATED MANAGER DO?

### PAYROLL



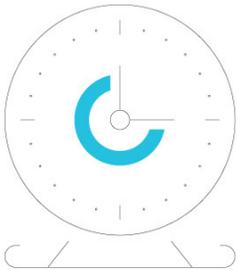
The Automated Manager was designed to assist the Office Manager in their day to day duties. Part of being an Office Manager is processing payroll in a timely fashion. With the Automated Manager you will be able to set up rules the system will follow to ensure accuracy with your timesheets. All of your totals will automatically be calculated for you and will have an option to export your timesheet data into a summary page that can be directly uploaded to your payroll software. Team members will be able to access their previous timesheets, reducing the number of questions the team needs to pose to management. The Automated Manager will assist you in reducing your payroll process to minutes instead of hours.

## SCHEDULING



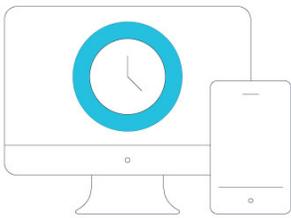
The scheduling module has been introduced to make your life easier in creating a simple to read schedule. With a couple of clicks of the mouse, you will be able to create a schedule for an employee, for years. Team members will be able to see just their own schedule as well as a way to see the whole office's schedule. All employees will be able to log into Automated Manager from anywhere as long as they have an internet connection; this ensure that your team is able to see when they are expected to work without having to call the office.

## SHIFT SWAPPING



Allow your team members to manage their own schedule without having to involve management. We work with your management to ensure that the system is set up to your office parameters. Once the initial schedule has been entered in to Automated Manager, the team members will be able to send a request of each other to swap shifts. If the employees both agree to the shift swap, Automated Manager will automatically update the schedule with the changes. A supervisor or manager would receive a notification of the swap, however no action is required by management.

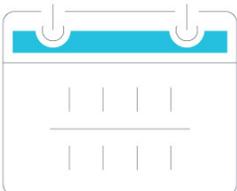
## VACATION REQUESTS



Automated Manager comes with a vacation module, where your employees will be able to request time away from work; again using the parameters that best match your office. We work with you and your team to set the module up properly, then sit back and let your employees send their requests. A manager will need to approve or decline vacation requests, however once approved or declined the system will do the rest of the work.

Automated Manager will; send a confirmation to the employee of their approved vacation request, remove the approved employee from your schedule, and post a shift to your shift trade board, for a peer to pick up the open shift. All requests are tracked and have a date and time stamp, so you do not need to figure out who requested a vacation first.

## MONTH END



The ultimate stress for an office manager is month end and payroll falling on the same day. With the Automated Manager both of these are now nonevents and they can now even be done from home.

By keeping your monthly reporting data in Automated Manager you will be able to pull reports and verify your month/year end at a glance. You will not need to be disorganized with a bunch of different spreadsheets and reports. Now you will have a module that has been designed to help you through your month end woes. Report accuracy is increased as you will be taking the human component out of your calculations.

## REPORTING



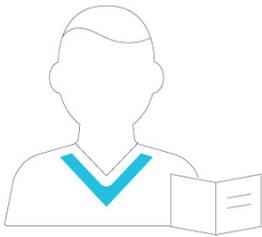
Our system comes with a several of standard reports that will help you decipher your month/year end reports. We provide many reports and visual graphs that bring a different perspective to your office data. We work with you and your team to develop ways to import data directly from your tracking systems into the Automated Manager. This enables you to take full advantage of the reporting suite that comes with the system.

## PAYABLES



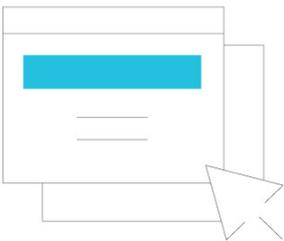
The cheque request and ledger options allow you to keep records of all cheques that printed in the past. Centralizing all of these requests in one area, allows for you to quickly search the system for past cheques printed to a specific individual or company.

## COACHING



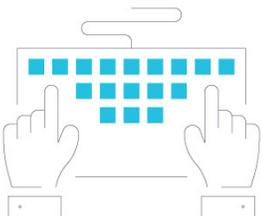
Keep track of all of your past staff communications, coaching sessions, and/or disciplinary matters in one local tool. This section is critical for your legal protection in the case of future disputes with employees. You can pull reports on entries that are stored in this coaching section to help you in making better decisions on staff issues.

## OFFICE DOCUMENTS



The document module allows your office the capability to go paperless, reducing waste and streamline your processes. You can store any documents, such as an "Office Policy Manual", online with Automated Manager. Again your team members will be able to access the documents from anywhere that they have an internet connection. We can also design employee sign off or acknowledgments to a document, these sign offs are tracked in the system so you know if an employee has read and agreed to your office policies and procedures.

## TASKS



You have the ability to assign tasks in Automated Manager to; a single user, a group of users, or a rotating list of users. These tasks will be tracked to find out who has completed a task or if there are many tasks still outstanding.