

ECR - Time Logging

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Time Tracker Log

CRM>Time Logging>Time Tracker Log

This has moved from System Configuration Module

It's a method for recording the amount of a worker's time spent on a job

Search button - As per the criteria entered or selected in the items on the Detailed panel or the Custom Search panel

Edit button - Edit a selected time log from the grid

Cancel button - Cancel a selected time log from the grid

Process button - Process button is a split button with additional buttons listed below it

Process To Invoice - Allows the user to process particular time logs to an invoice

Add To Job - Allow the user to process a particular time log to a job This button is only available if the time log has been setup accordingly.

Flag All for Invoice - Allows the user to flag a selected subset of time logs for invoicing based on the search criteria

Flag All for Archive - Allows the user to flag a selected subset of time logs for archiving based on the search criteria

Print button - Print button is a split button with additional buttons listed below it

Print - Prints the selected time log detail

Print Grid - Prints the selected subset of time log in a grid report

Export - Exports the selected subset of time logs to an Excel format

Detailed Tab Search

Search according to the selection made

Debtor – search by debtor

SLA – Search by selecting the SLA customers from the drop down arrow

Employee – search by selecting the employee from the drop down arrow

Date From – Enter the date from which the time log search should run from

To Date – enter to date to limit the time log run

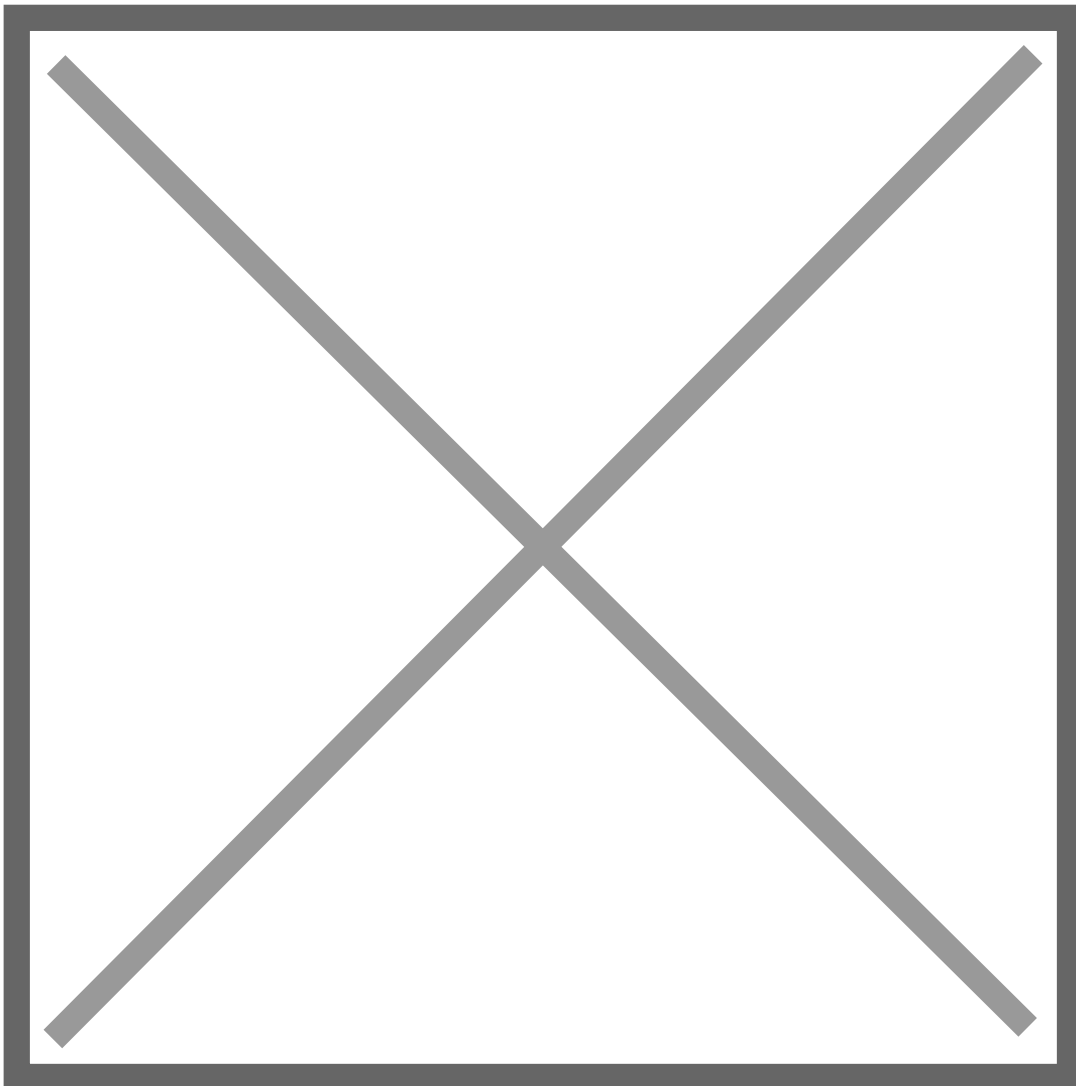
Custom Fields Tab

Select the category rom the drop down arrow

Time Tracker Clock Job

When clocking for Checkin and Jobs, one is able to use this window outside of the system to capture time.

.....\wab\acck\TimeTracker.csp



Time Tracker Setups

Before starting to use the time tracker clock, some setups need to be done

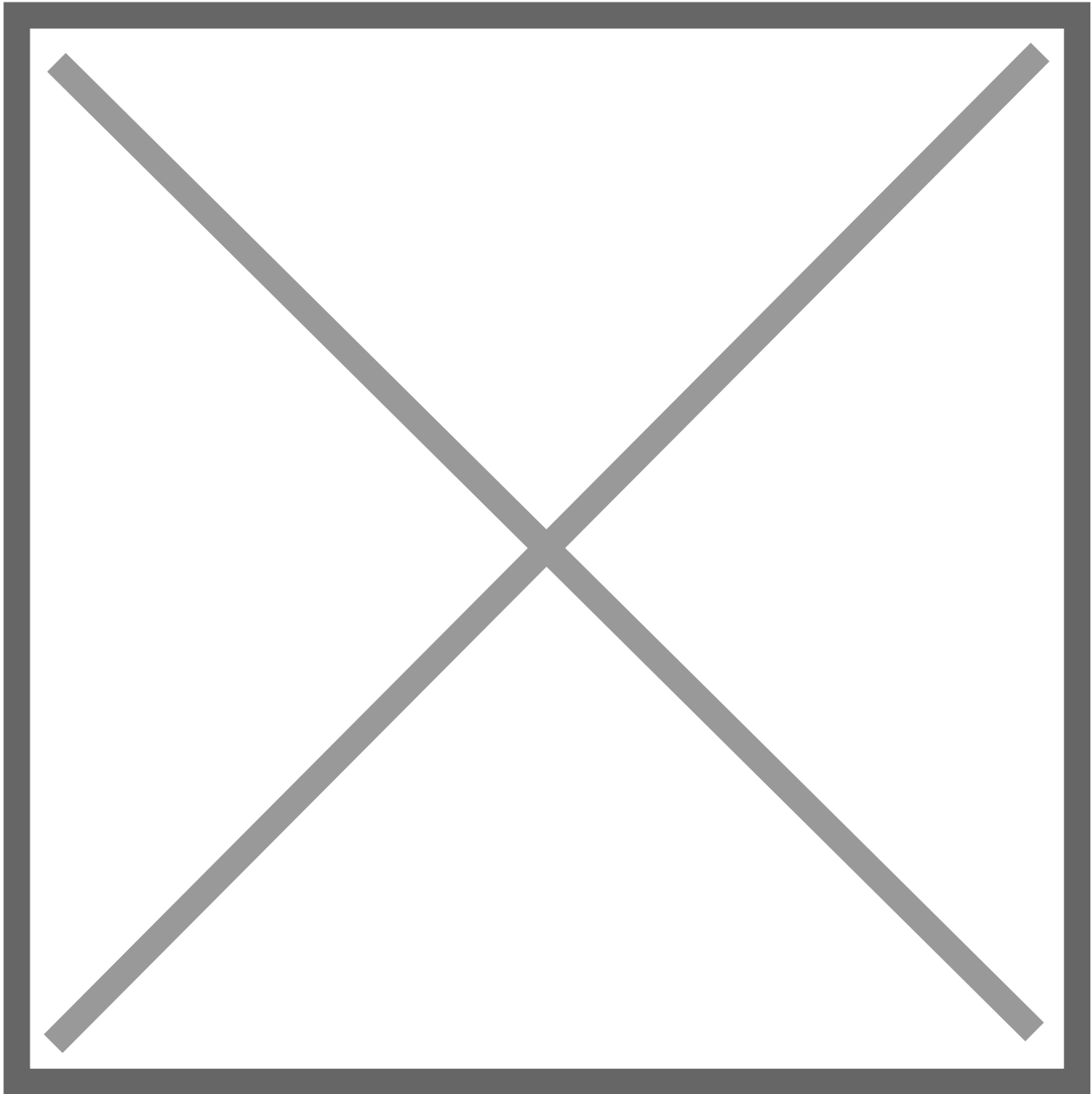
Make sure that Codes are more than 5 characters long and letters need to be in capital

1. User setup with barcodes

2. Contract tasks setup

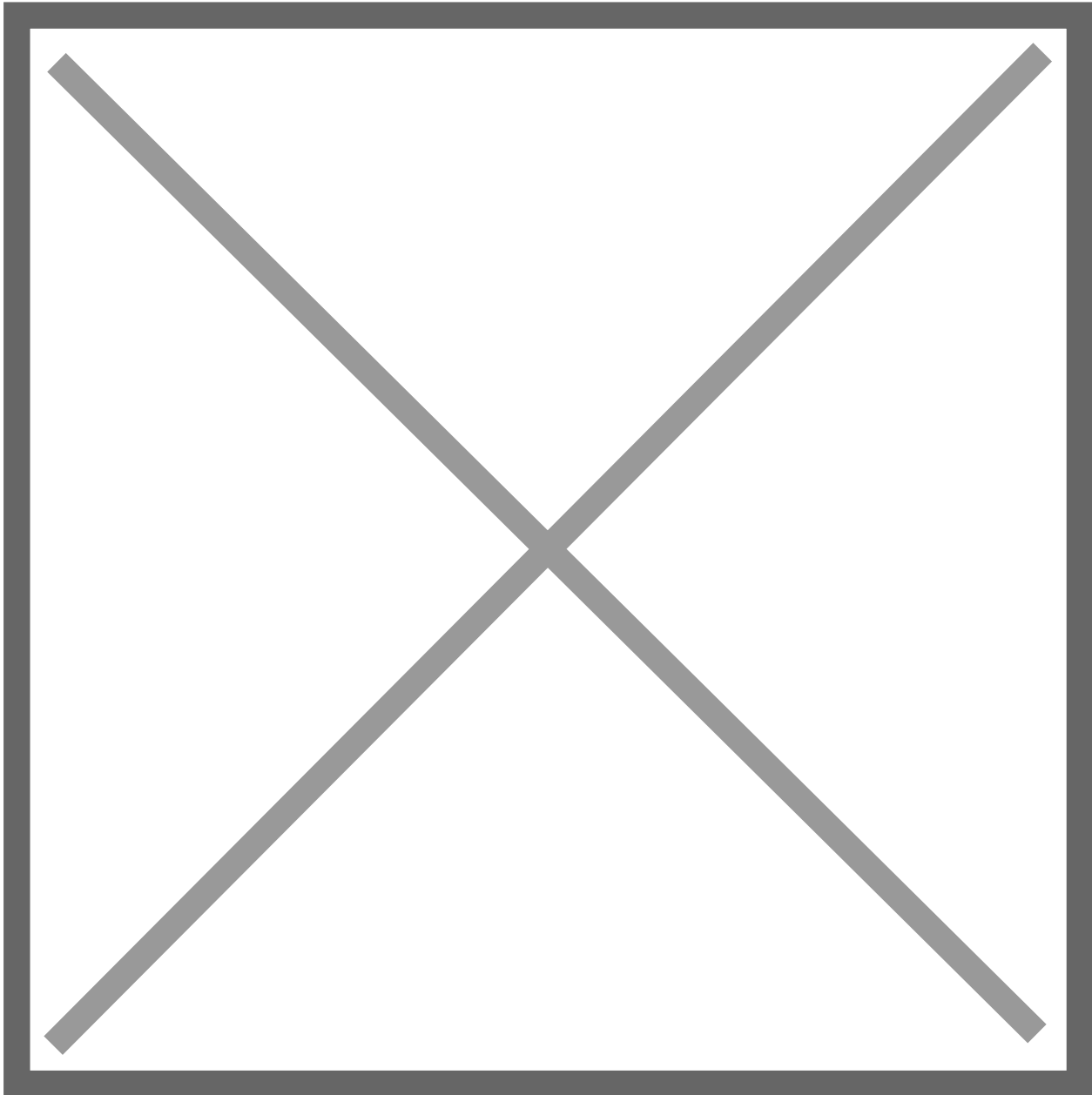
3. Inventory service items setup

Setup your users with Barcodes



Make sure that you have setup your contracts and SLA maintenance tasks

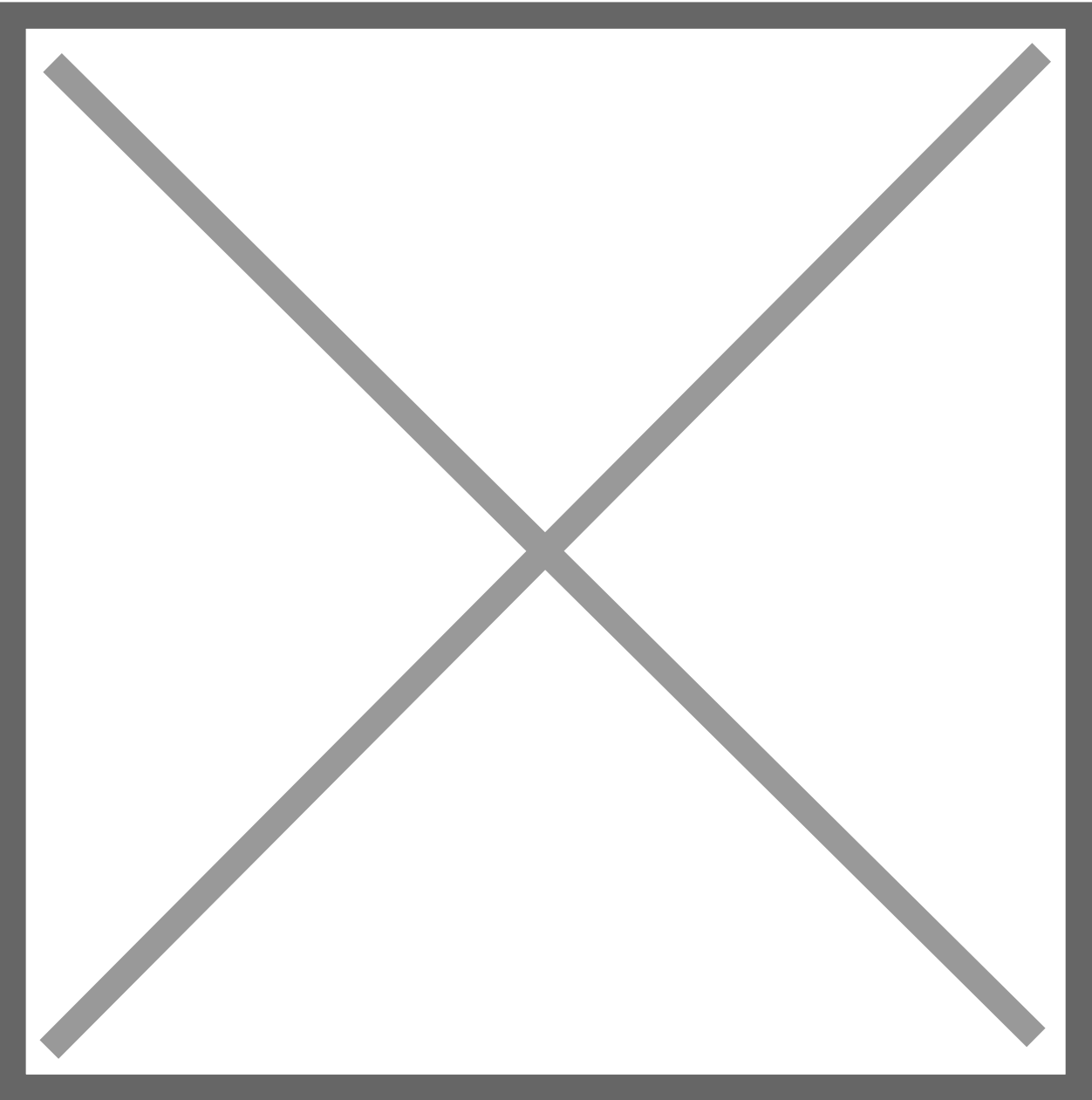
These tasks will be used on the Time Tracker clock



Setup some inventory service items which link onto the job with a budget quantity

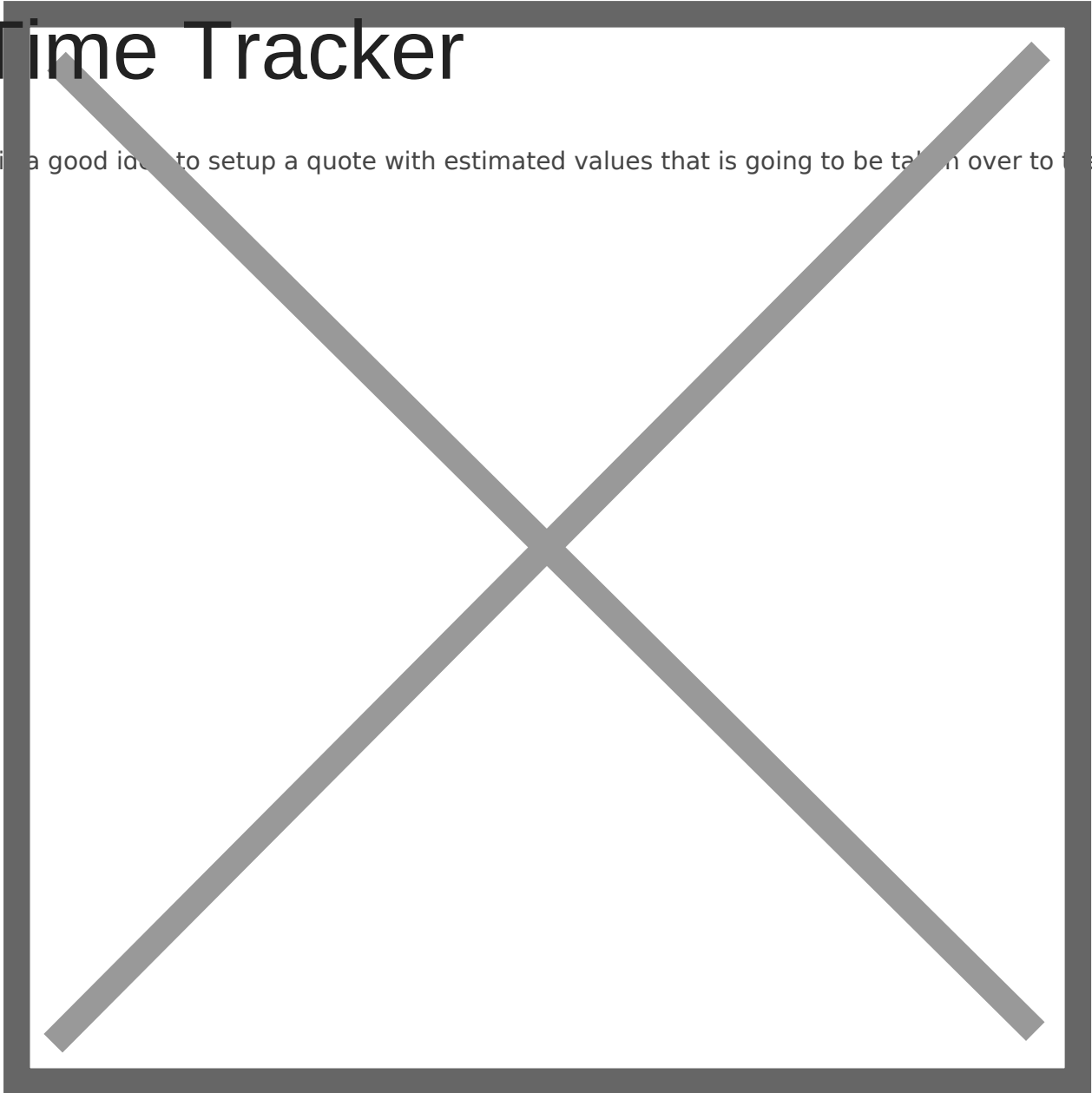
These are used to link the time logs to the specific job line, otherwise it will create a new line on the job.

If it creates a new link, you cannot compare your budget to actual time



Setup quotes and jobs ready for Time Tracker

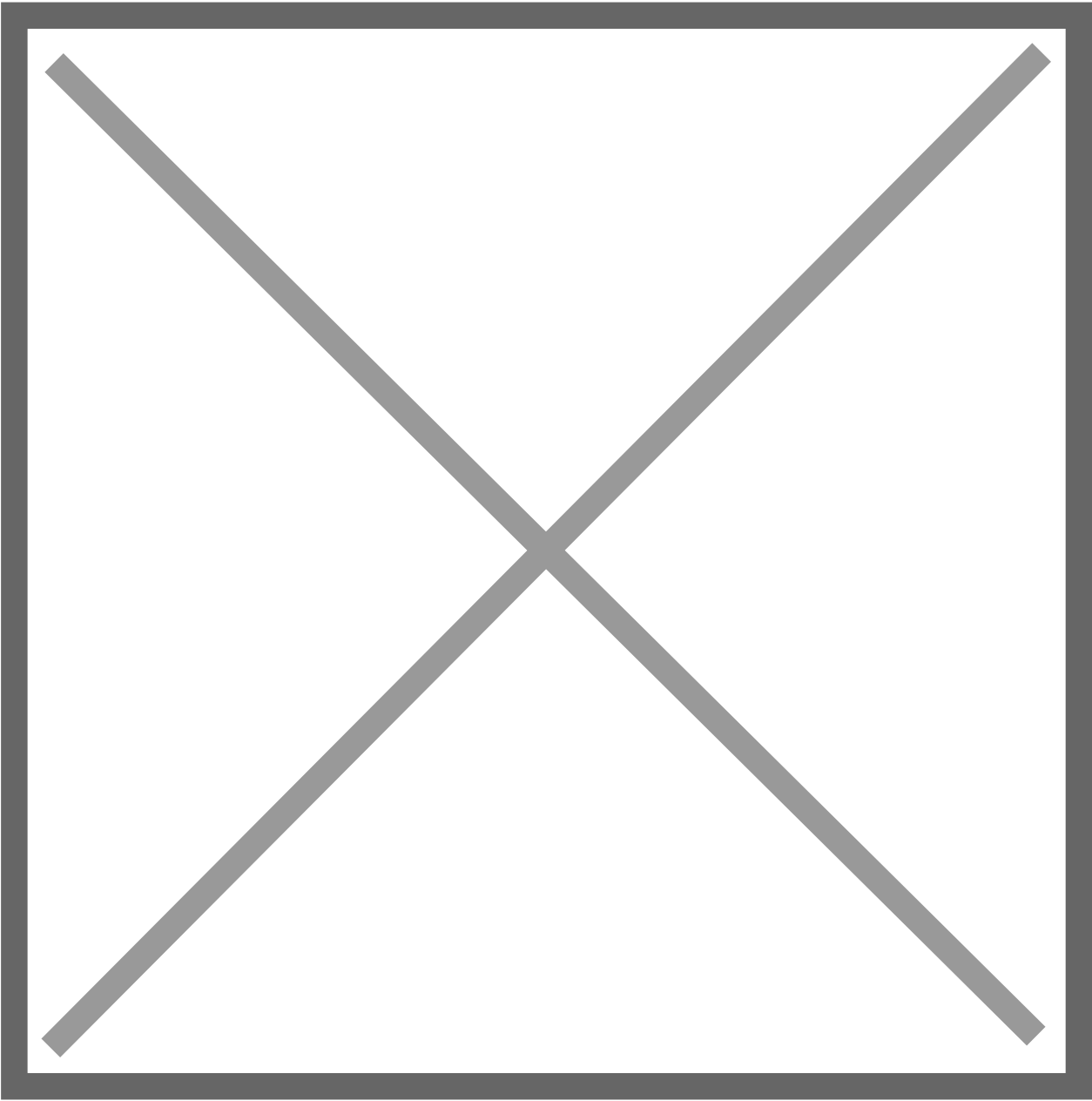
It is a good idea to setup a quote with estimated values that is going to be taken over to the job



Prompted quotes to job

Assign specific line items to appear on your barcode print out

Put the tick on for Time Log Link Barcode - This tick tells the Barcode printout to put that item on the barcode printout



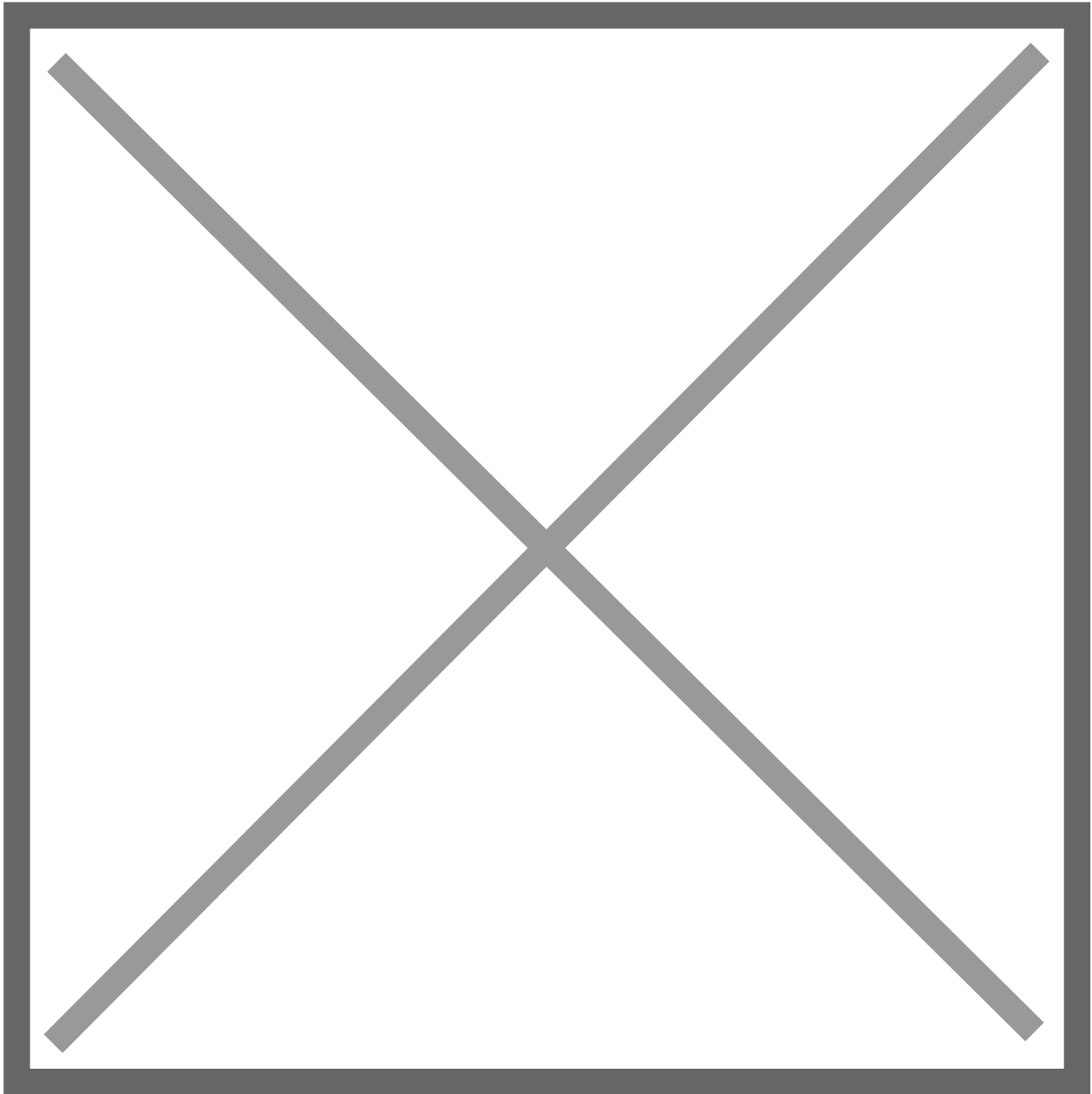
Barcodes Prepare

One would need to setup barcodes for the following:

1. Employee / user list of barcodes
2. Contract tasks to be used
3. Existing active jobs
4. Job Line Links for each job

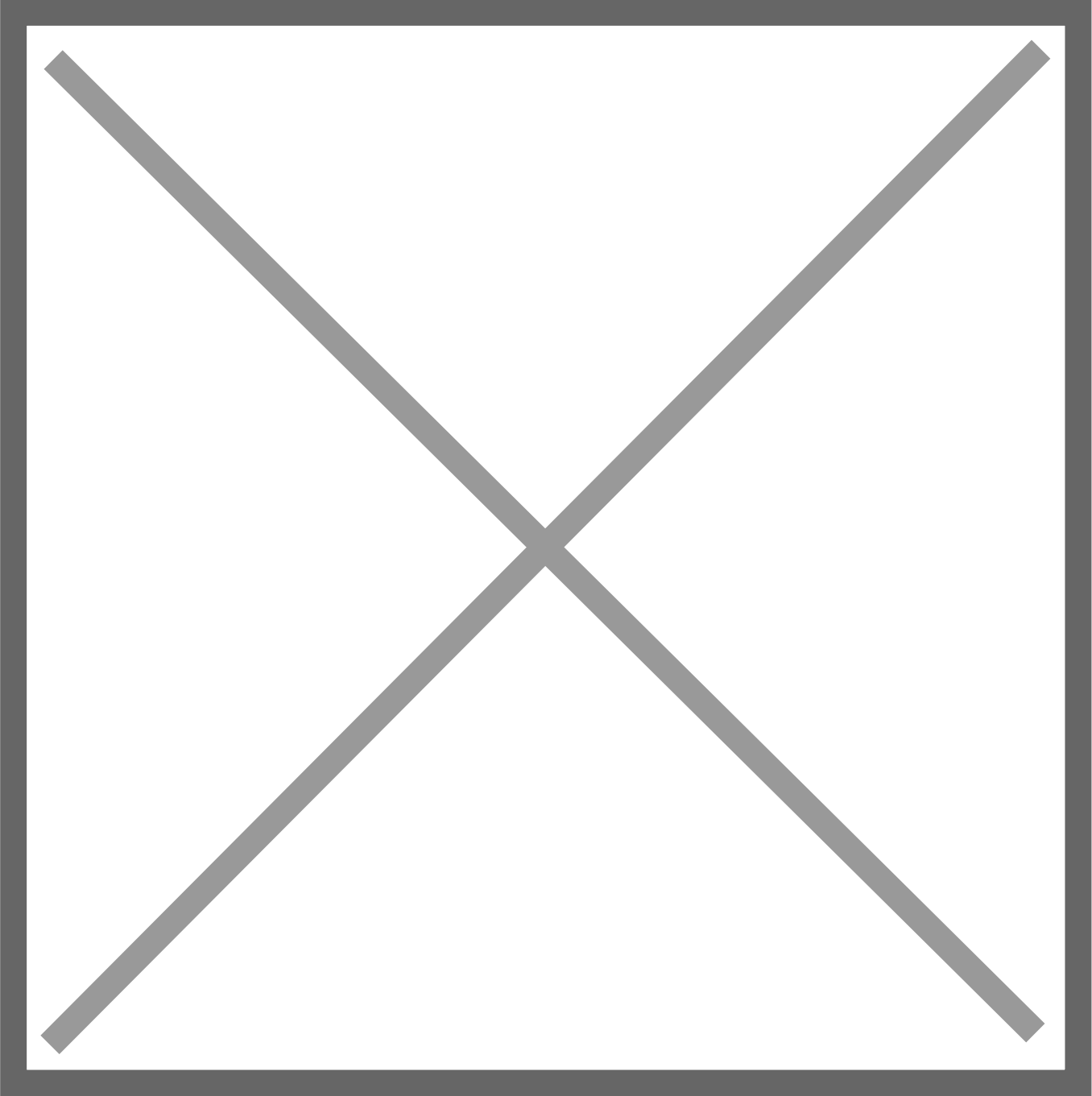
An Excel sheet with barcodes can be used to set this up.

The barcode font³⁹ needs to be installed on your computer



Jobs for the week created print out

Use the Job barcodes to print out new job numbers with their job line links



Clock In Monitor

View all users that have clocked in for the day and those that have not

View what jobs the users are working on currently

CRM



Configuration +

Activity +

Time Logging -

Time Tracker Clocks

Planned Timelog Schedule

Time Logging

User Time Logging

Time Log To Invoice Search

Create Time Log

Quick Time Log

Time Tracker Clocks

Search Edit Delete Process to Time Log Change Data Print/Export

Time Clocks Clock Ins

Clock In Date: 2023-10-27

Peter Smit
Not clocked in

Malcolm Granville
Clock In: 21:59

Gerrit van Rooyen
Not clocked in

Green	Clocked in for day
Red	Not clocked in

Planned Timelog Schedule

Planned Time Log Schedule

Seach

Planned Time Log Schedule

Search

Edit

Delete

Process to Time Log

Activate Outlook Sync

Deactivate Outlook Sync

Customer Link

Employee: Paige Granville

Date: 2024-09-09

Monday (W37-2024)

View [WIP]: Day

Total Hours Day:

Total Hours Week:

Planner

Calendar

Hide Unused Rows

COMPANY

HOURS

Monday 2024-09-09

09

10

11

12

13

14

15

16

17

18

DESCRIPTION

TIME

No records to display

No records to display

Planned Time Log Schedule

Search

Edit

Delete

Process to Time Log

Activate Outlook Sync

Deactivate Outlook Sync

Customer Link

Employee: Paige Granville

Date: 2024-09-09

Monday (W37-2024)

View [WIP]: Day

Total Hours Day:

Total Hours Week:

Planner

Calendar

Refresh

Today

Jump to:

Go

Day

Week

2 Weeks

Month

Aug 26, 2024

Tue 27

Wed 28

Thu 29

Fri 30

Sat 31

Sep 1

2

3

4

5

6

7

8

Today 5:59pm

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

Oct 1

2

3

4

5

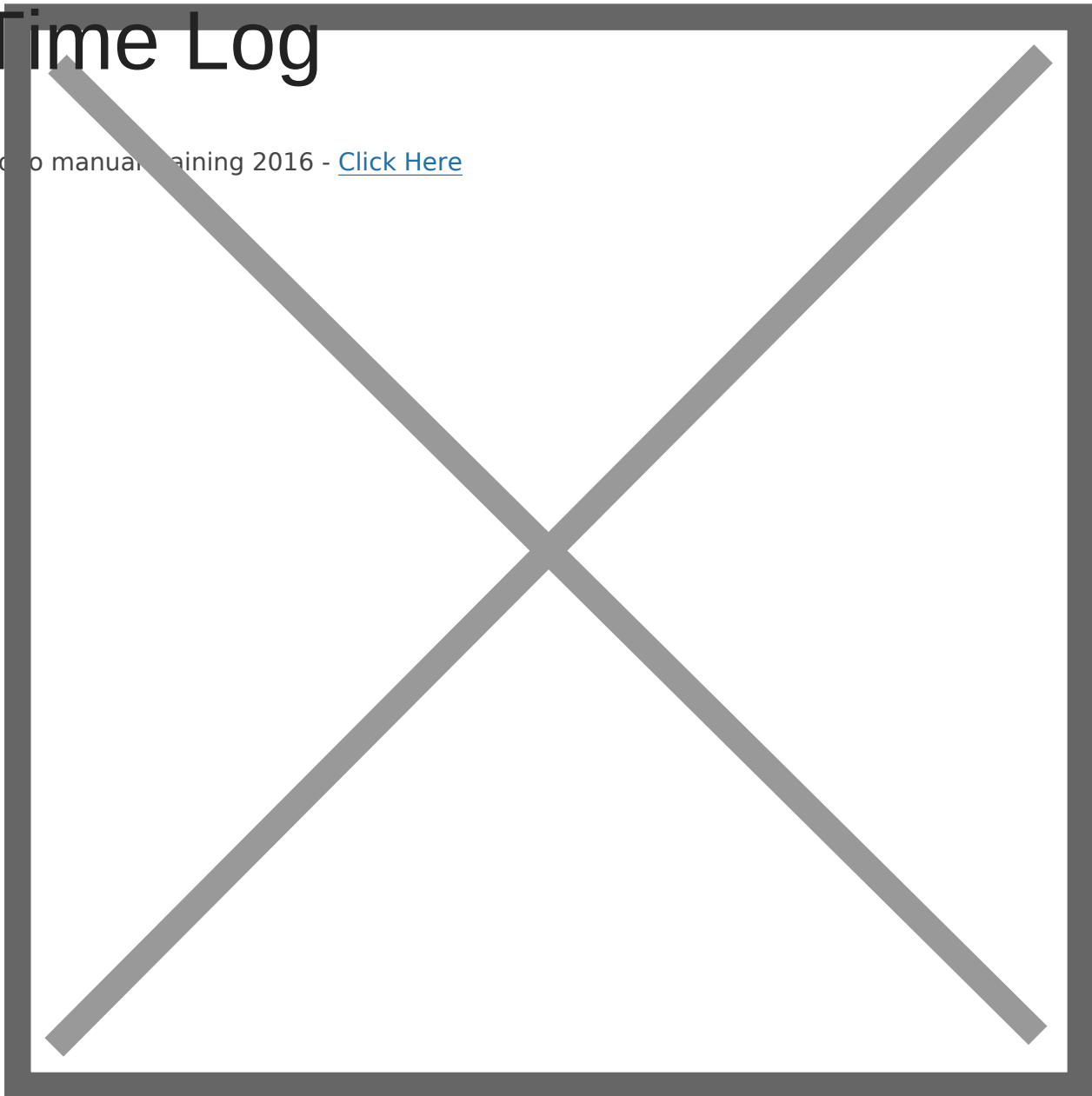
6

Time Logging

Time Logging

Time Log

Video manual training 2016 - [Click Here](#)



It's a method for recording the amount of a worker's time spent on a job

Search button - As per the criteria entered or selected in the items on the Detailed panel or the Custom Search panel

Add button - Add a new time log

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Cancel button - Cancel a selected time log from the grid

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Add To Job - Allow the user to process a particular time log to a job This button is only available if the time log has been setup accordingly.

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Flag All for Archive - Allows the user to flag a selected subset of time logs for archiving based on the search criteria

Print button - Print button is a split button with additional buttons listed below it

Print - Prints the selected time log detail

Print Grid - Prints the selected subset of time log in a grid report

Export - Exports the selected subset of time logs to an Excel format

Detailed Tab Search

Search according to the selection made

Debtor – search by debtor

SLA – Search by selecting the SLA customers from the drop down arrow

Employee – search by selecting the employee from the drop down arrow

Date From – Enter the date from which the time log search should run from

To Date – enter to date to limit the time log run

Custom Fields Tab

Select the category rom the drop down arrow

Add or Edit Time Log

Details:

Edit Time Log

AttachmentMemoCreate ReminderAdd DisbursementsEmail SelfPrintInfoClose

Time Log - T14268

DetailDetail 2Travel ExpenseInvoice LinesCustom Fields

Debtors:ERP001 - ERP Solutions LtdJob Number:

Contact Person:Faheema GranvilleViewJob Line Link:

Employee / Assign To:Pamela DeanNotes:CTCSC

Date Of Log:2024-09-09

Contract:2019/MG - 2019 Malcolm Granville

Task:AdministrationRef

Service Item:AdministrationTimeRef

Reference:InvAdministration

Billing Rate:Non Charge35.00

Potential Billing Rate:2022 Charge \$ 85Non Billable:

Employee Rate:Rate 1 - Normal Time

Time From:08:30+-Start Time

Time To:09:00+-End Time

Bill Qty:.5E/T:0 h : 30 mins

Status / Severity:Received

Locked for Invoice:Closed:

Use Break:

Copy Note To Support LogCopy Note To Memo

Save & NewSave & CloseSaveCloseTo OutlookAdd to Job

Details	
Debtor	Select the debtor
Contact Person	Your Superior/Manager
Employee	Select the employee responsible for the Time Log

Date Of Log	Select/enter the date for the Time Log
Contact	
Task	Select the desired task or type of work you are doing at this time
Service Item	Select the desired Service Item for the Time Log
Reference	Enter a brief description/reference (The tick box next to the Reference field, when tick will automatically copy the contents of the Reference field to the Notes field and add it to the beginning of the notes in the Notes field if there are already any notes entered there.)
Billing rate	Select the desired task
Potential Billing Rate	What you could charge for this task
Non-Billable	Tick box you could tick if this is not a chargeable task
Employee Rate	What this time spent costs the company (Employee hourly rate)
Service Level Agreement	Select the desired SLA. Only SLA that are related to this Debtor will be available for selection.
Time From	Time when the Time Log was started
Time To	Time when the Time Log was ended / finished
Bill Qty	This will auto populate the house when you have added your to and from time
Job Number	To allocate this time to a specific job
Job Line Link	To link this time to a specific task
Notes	To add notes to a job
Status / Severity	This refers to the status of the job completed at this time (Closed, pending etc)

Locked for invoice	This time log is locked as its being invoiced
Use Break	

Details 2

Edit Time Log

AttachmentMemoCreate ReminderAdd DisbursementsEmail SelfPrintInfoClose

Time Log - T14268

DetailDetail 2Travel ExpenseInvoice LinesCustom Fields

Asset:L: ☒

In Warranty:☐

View Asset Item

Support Task:

Support Sub Task:

Log No:

Remove Support Log

Support Link:

Generic Field 1:

Generic Field 2:

Generic Field 3:

Order Number:

Geolocate:

Map

Location Date Time:

Add Time Logs On Job As:

Add To Job:☐☒ CTC☐ SC

Added To Job:☐

Remove T/L To Job

Job Number:

Job Line Link:

Job Line Link Display: --

New Job Line:☐

Sales Lead:

Remove Sales Lead

Leave:☐

Sales Lead Link:

Sick:☐

Save & NewSave & CloseSaveCloseTo OutlookAdd to Job

Details 2	(This is where you add your sick leave or annual leave)
Asset	
In Warranty	
Support Task	
Support Sub Task	
Log No.	

Support Link	
Generic Field 1-3	Text field to add your own note
Order Number	Should you have received an order number for the task you are doing at this time
Geolocation	Maps to add where you were
Location Date and Time	
Add Time Logs on Job as:	
Sales Lead Link	You can add a link here form a sales lead that has lead to this time being done
Leave	Tick the tick box if you had annual leave on this specific day
Sick	Tick the tick box if you were sick on this day

Travel Expenses

Edit Time Log

Attachment
Memo
Create Reminder
Add Disbursements
Email Self
Print
Info
Close

Time Log - T14268

Detail
Detail 2
Travel Expense
Invoice Lines
Custom Fields

Charge Travel Fees:
☐

Travel Bill Type:
☐ Distance
☐ Time Charge
☒ Charge Both

Distance Rate:

Km From:

Km To:

Km Billing Value:
0.00

Time Rate:

Travel Time:

Total Travel Time Cost:
0.00

Travel Item:
None

Charge Toll Fees:
☐

Toll Cost:

Toll Fees Item:
None

Save & New
Save & Close
Save
Close

To Outlook
Add to Job

Charge Travel Fee	Tick the tick box if travel fee applies
Travel Bill Type	Choose if this is a time charge or if you charge per KM or for both
Distance Rate	Dollar charge per km
Km From:	Add area traveling
Km to:	Add area you are traveling to
Km billing Value	This will be auto calculated with the above information
Time Rate:	Add your hourly rate
Travel Time:	Add how many hours your travel was
Total Travel Time Cost	This will be auto calculated with the above information
Travel Item:	Here you can add what the travel was for (Sales, admin, consulting)
Charge Toll Fees:	Tick the box if you crossed any toll roads
Toll fee item:	Here you can add what the travel was for (Sales, admin, consulting)

Add Disbursements

Time Log Search

Search Add

Detailed Cust

Time Log No.:
Reference:
Debtor From:
Contract:
Date From:
Total Hours:

Page 0 of 0

Att Memo

Add Time Log

Attachment Memo Create Reminder Add Disbursements Email Self Print Info Close

Time Log

Detail

Debtor:
Contact Pe
Employee
Date Of Lo
Contract:
Task:
Service It
Reference
Billing Rat
Potential B
Employee
Time From
Time To:
Bill Qty:

1.00 E/T: 1 h : 0 mins Break.

Save & New Save & Close Save Close To Outlook Add to Job

Add Invoice Line

Time Log Item

Detail Notes Close

Item:
Item Description:
Quantity: 0.00
Cost per item: 0.00
BOM:

Warehouse:
Total Cost:
BOM Recipe

Selling per item: 0.00
Line Total ex: 0.00
VAT Value: 0.00
Total Selling Inc: 0.00
Sequence No: 0.00

Line Discount: 0.00
VAT:
Mark Up: 0.00
Unit Of Measure:
Add to Job: ☒ CTC ☐ SC

Save & New Save & Close Close

Add Invoice Line



Time Log Item



Detail

Notes

Close

Copy Description

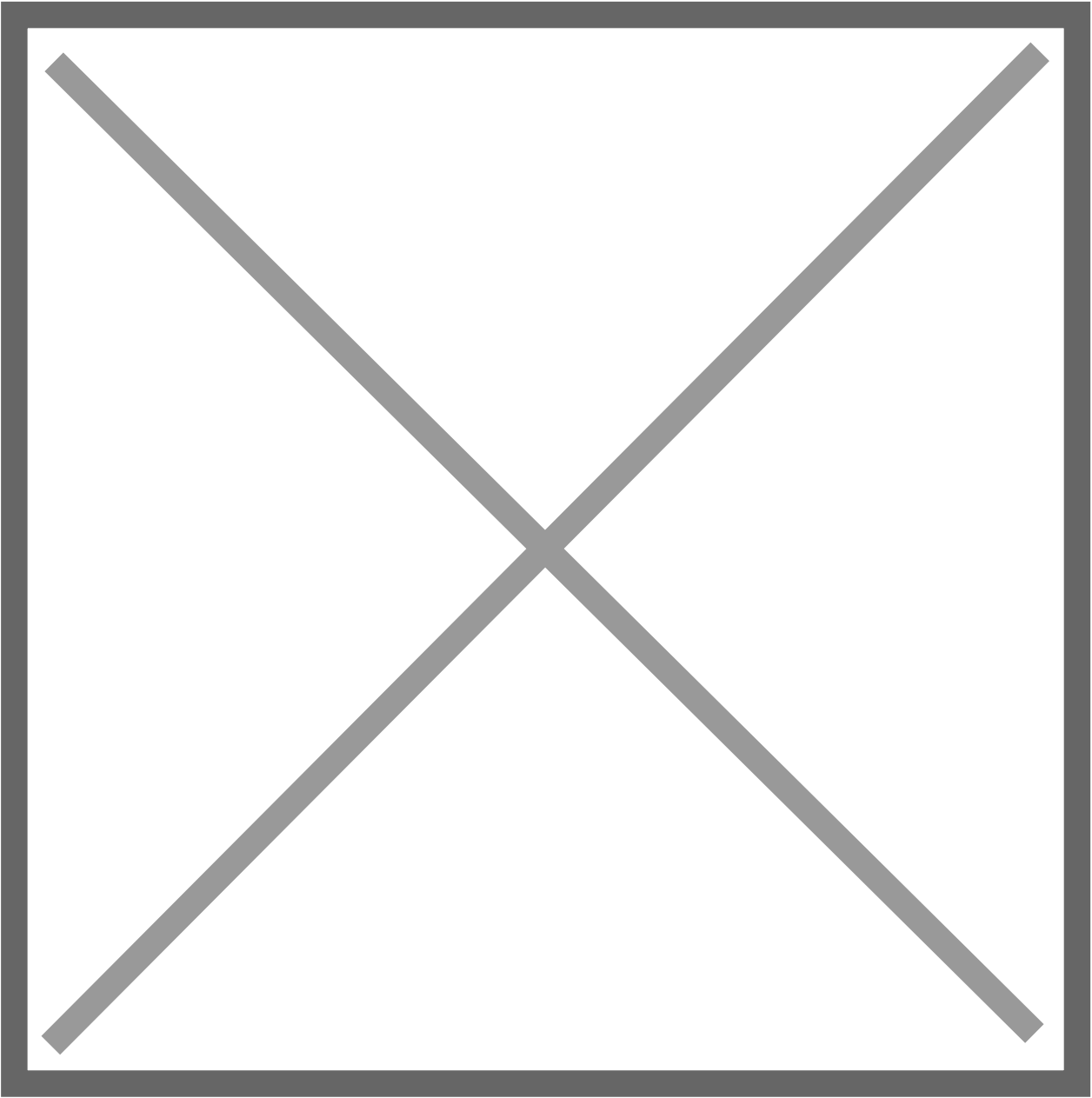
Save & New

Save & Close

Close

Details 2

Add or Edit Time Log



Details Tab 2

Support task	Select the desired Task

Support Sub Task	Select the desired Sub-Task
Log No	Support Log Number - in the event that this Time Log was created from a Support Log then the Support Log Number will be displayed here.
Add To Job	Allows the user to capture labour time for the selected Debtor onto a Job. The job must be either started or not started and related to this selected Debtor.
CTC / SC	Specifies whether the labour will be add to the job as Cost To Company or Scope Creep
Job Number	Select the applicable Job number. Only Jobs that are related to the selected Debtor will be available for selection.
Employee Rate	Select the desired Employee Rate.

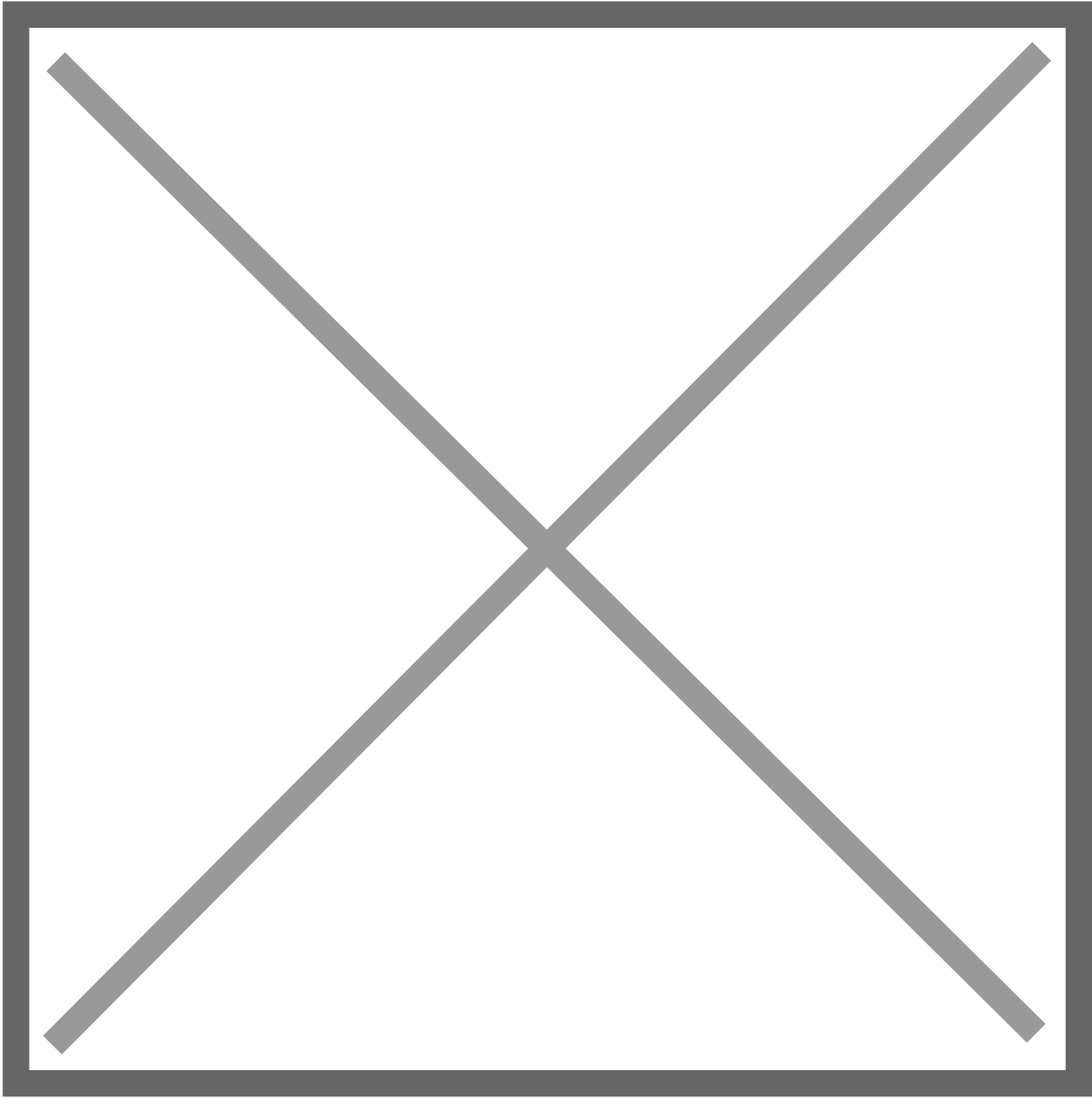
Travel Expense Tab

Add or Edit Time Log

Travel Expenses Tab	
Charge Travel Fees	Tick if Travel Fees are to be charged
Travel Bill Type	Select either Distance or Time Charged

Distance Rate	A distance value to be used in the calculations of a travelled billing value
Kilometres From	Enter the Starting kilometres value
Kilometres To	Enter the Ending kilometres value
Kilometres Billing Value	A calculated value to be billed
Time Rate	A time value to be used in the calculations of a time travelled billing value
Travel Time	Time duration of the journey
Total Travel Time Cost	A calculated travel time value to be billed
Travel Item	Select the appropriate inventory item for travel
Charge Toll Fees	Tick if Toll Fess are to be charged
Toll Cost	Toll Fee value
Toll Fee Item	Select the appropriate inventory item for toll fees
Delete button	Allows a user to delete a time log item

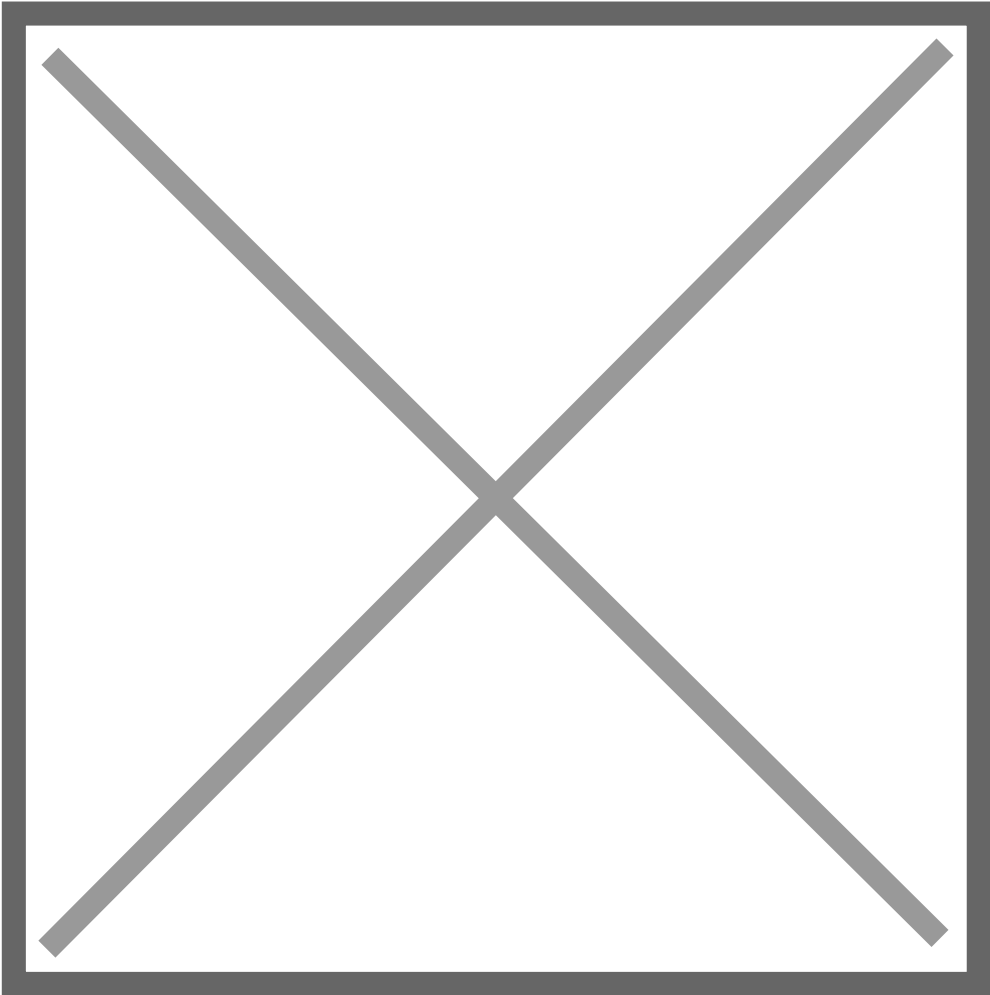
Invoice Line Tabs



Invoice Tab	
Add button	Allows a user to add an invoice associated with the time log
Edit button	Allows a user to make changes to the time log item
Delete button	Allows a user to delete a time log item

Custom Fields Tab	Select category from the drop down arrow and save

Custom Fields Tab



Custom Fields Tab	Select category from the drop down arrow and save
System buttons	
Save button	Save the Time Log
Save And New button	Save the Time Log and open a new Time Log
Save And Close button	Save the Time Log and close Time Log
Close button	Close Time Log
Attachment button	Open Attachment window for managing attachments
Print button	Print current Time Log

Time Logging

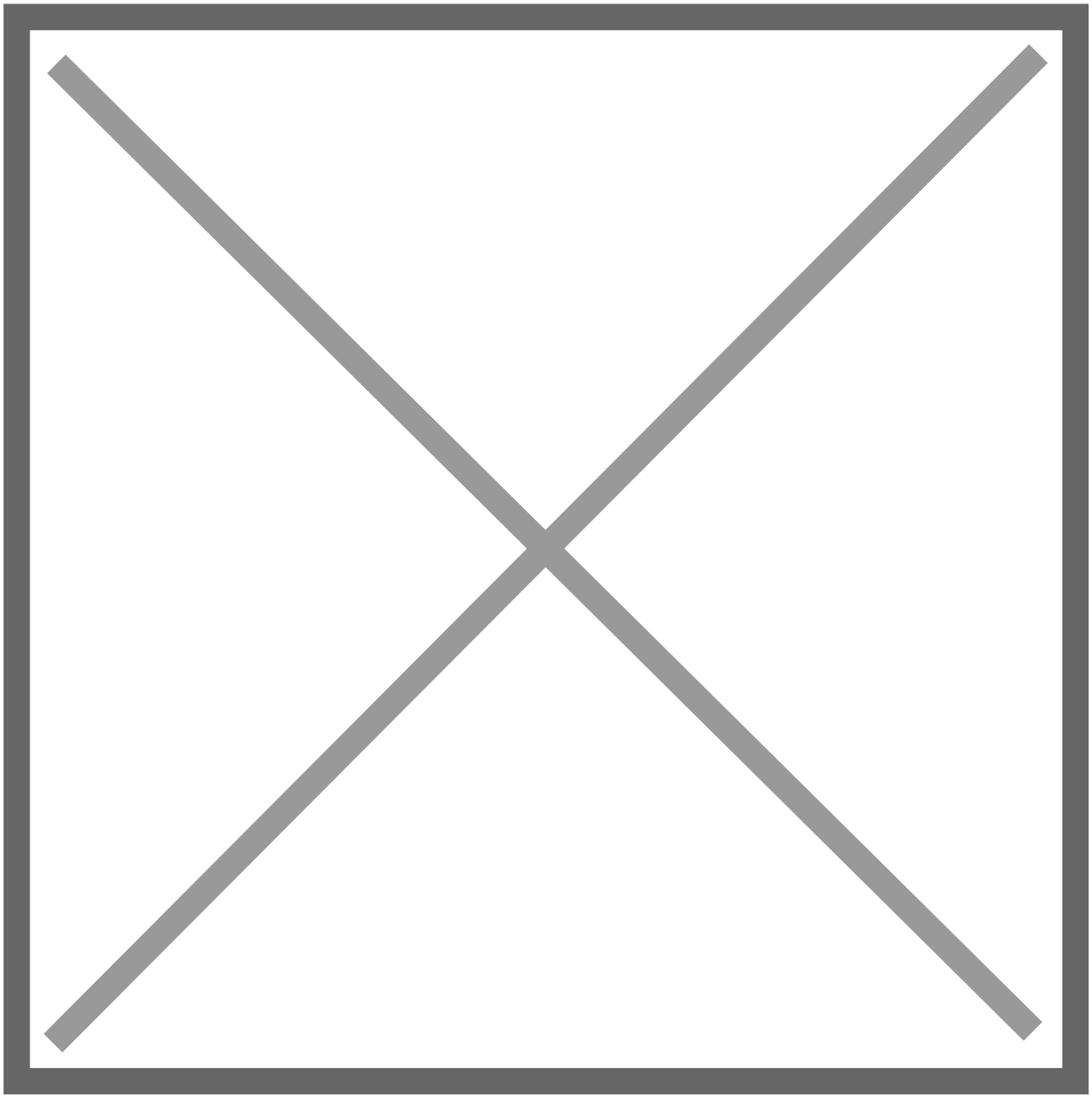
Timelog to Outlook Calendar

Video training manual 2019 - [Click Here](#)

Creating time logs and pushing these to your outlook calendar.

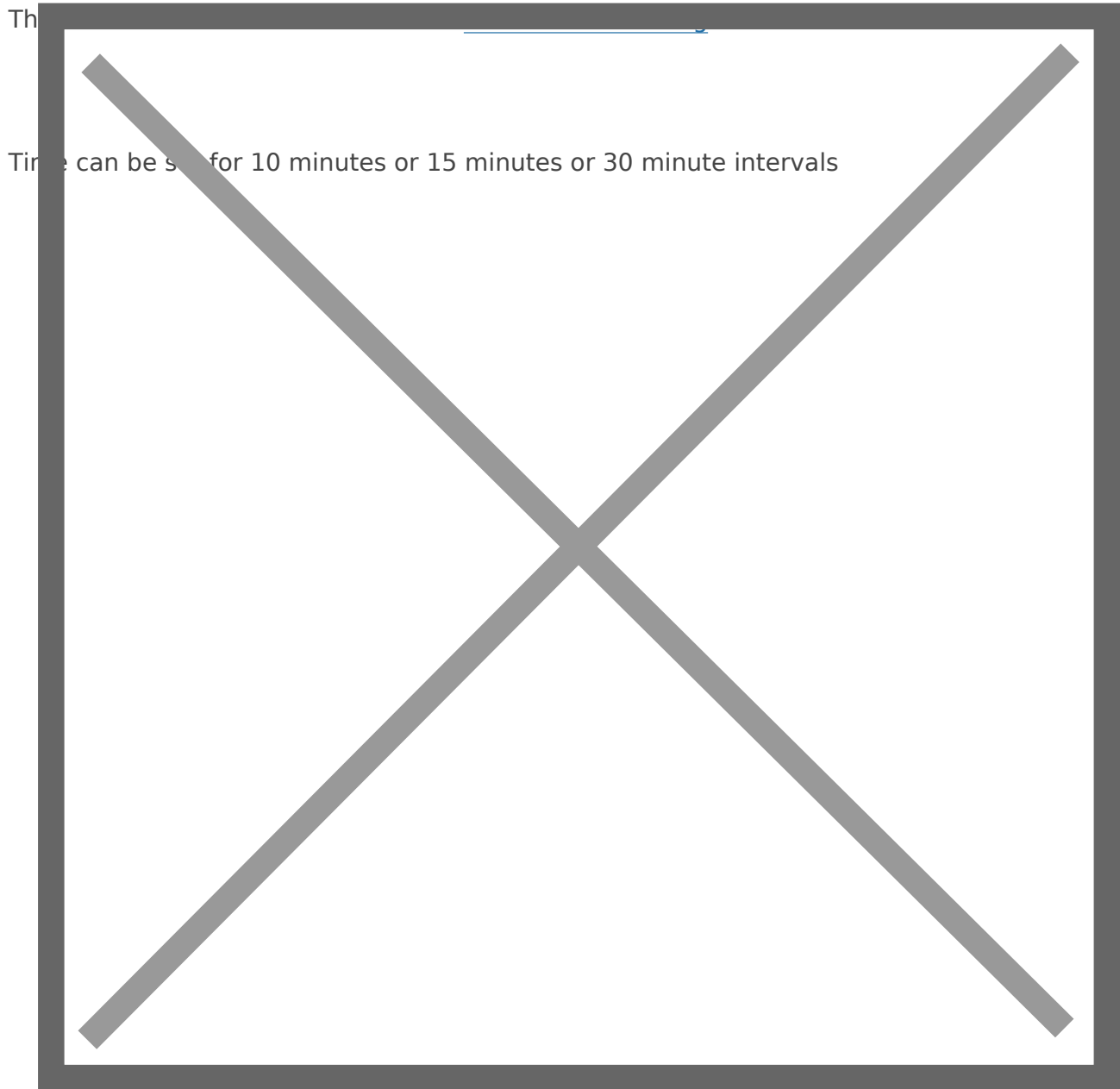
It is a great way to get your staff to first capture in the system and then push it to the outlook calendar.

This way your time logs are up-to-date and you reduce having to double enter.



Timelog Time Increments

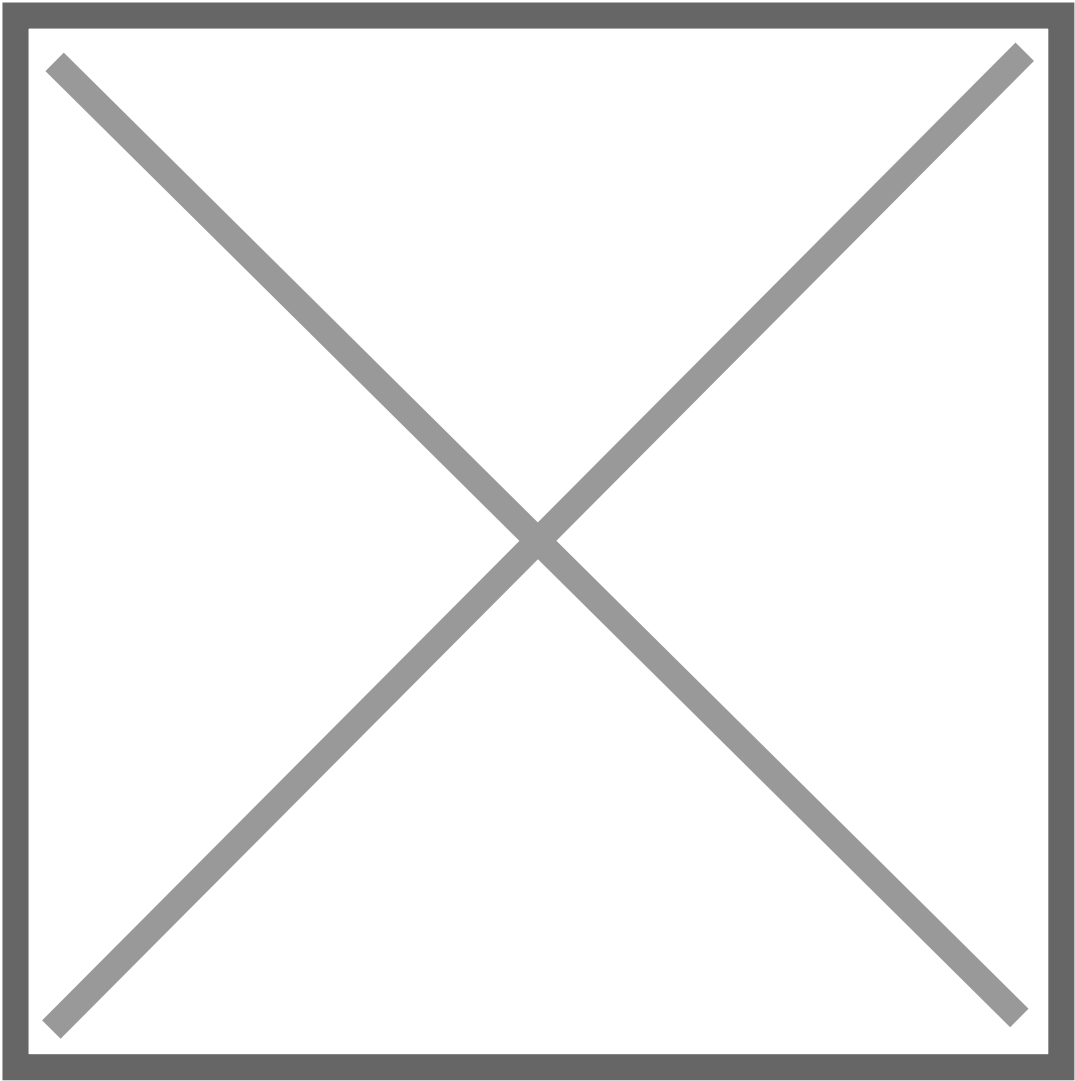
Time log time increments are defaulted to 5 minutes up or down.



User Time Logging

User Time Logging Search

Dashboard Tab



Detailed Tab

User Time Log Search

Search Add Edit Clone Email Self Import Time Log Print / Export

Dashboard Detailed Custom Fields Calendar Contract

Time Log No: Debtor From: Employee: Contract: Date From: Week From: Time Log Status: Division:

Time Log Group: Other Debtor To: Task: Date To: 2024-09-10 Week To: 37 Status / Severity: All Account Manager: All

Total Hours: 946h48m Billable Hours: 135.65 Non Billable Hours: 435.54

Page 1 of 5 Remove Paging: Displaying 1 - 100 of 4

#	Att	Memo	Log No.	Invoiced/ C	Cancelled	Support Log No.	Log Date	Debtor Name	Contact Person Name	Reference	Invoiced	Job No.	Job Description	JobLine Description
1			T657				2024-09-04			t3				
2			T659				2024-09-04			t6				
3			T654				2024-09-03			Leave				
4			T658				2024-09-03		m G	t5				
5			T655				2024-09-02			consulting time				
6			T656				2024-09-01			Sick day				

Custom Fields Tab

User Time Log Search

Search Add Edit Clone Email Self Import Time Log Print / Export

Dashboard Detailed Custom Fields Calendar Contract

Category: All

Calendar Tab

User Time Log Search

Search Add Edit Clone Email Self Import Time Log Print / Export

Dashboard Detailed Custom Fields Calendar Contract

Time Log Group: Other Employee: Paige Granville Task: All Display Type: Customer Reference

Today Jump to: Go

Today	Sep 1, 2024	Mon 2	Tue 3	Wed 4	Thu 5	Fri 6	Sat
8	9	Today 8:37am	11	12	13		
15	16	17	18	19	20		
22	23	24	25	26	27		
29	30	Oct 1	2	3	4		

On the Calendar we have a few indicators define time logs captured:

** Indicates Time log was geo located at the client's location - Green

!! Indicates Time log was geolocated but not captured in the vicinity of the actual client. - Orange

Time log was edited on a date different to the time log date - Yellow

none indicates Time log was not geolocated - Red

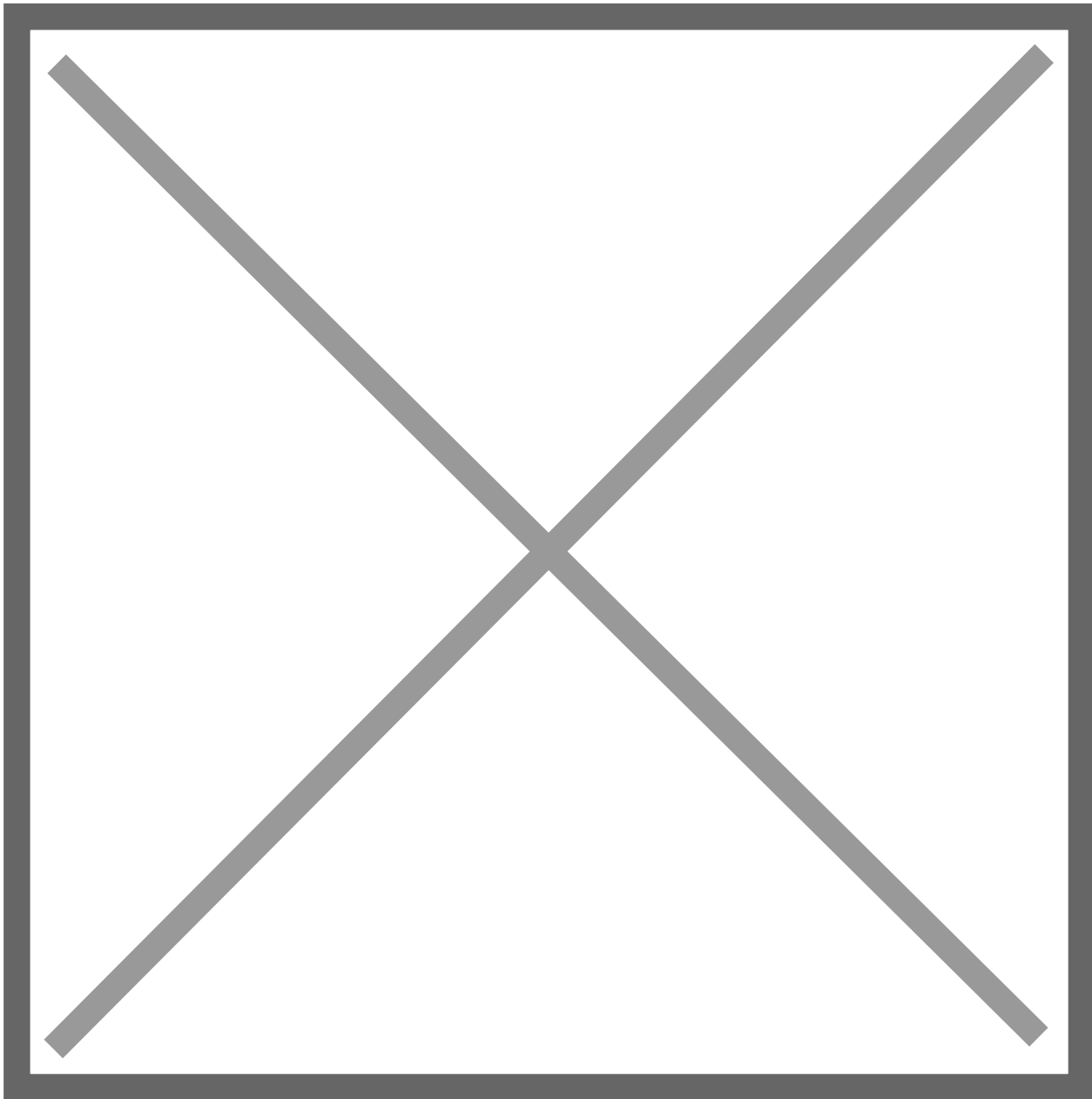
Time Log to Invoice Search

Time Log to Invoice Search

Time Log Invoice Search

Video training manual 2017 - [Click Here](#)

Video manual training 2016 - [Click Here](#)



Search: when the user click on search the system will generate and display available time log sessions

Create new sessions: this button is used when a new session needs to be created

Edit Existing Session: this Button is used when a user needs to edit an existing time log to invoice session

View Sub -Debtors: this button will allow the user to view available sub-debtors

Debtor: Search for a debtor

Employee: search per employee

Division: Search per Division

Account Manager: Search per account manager

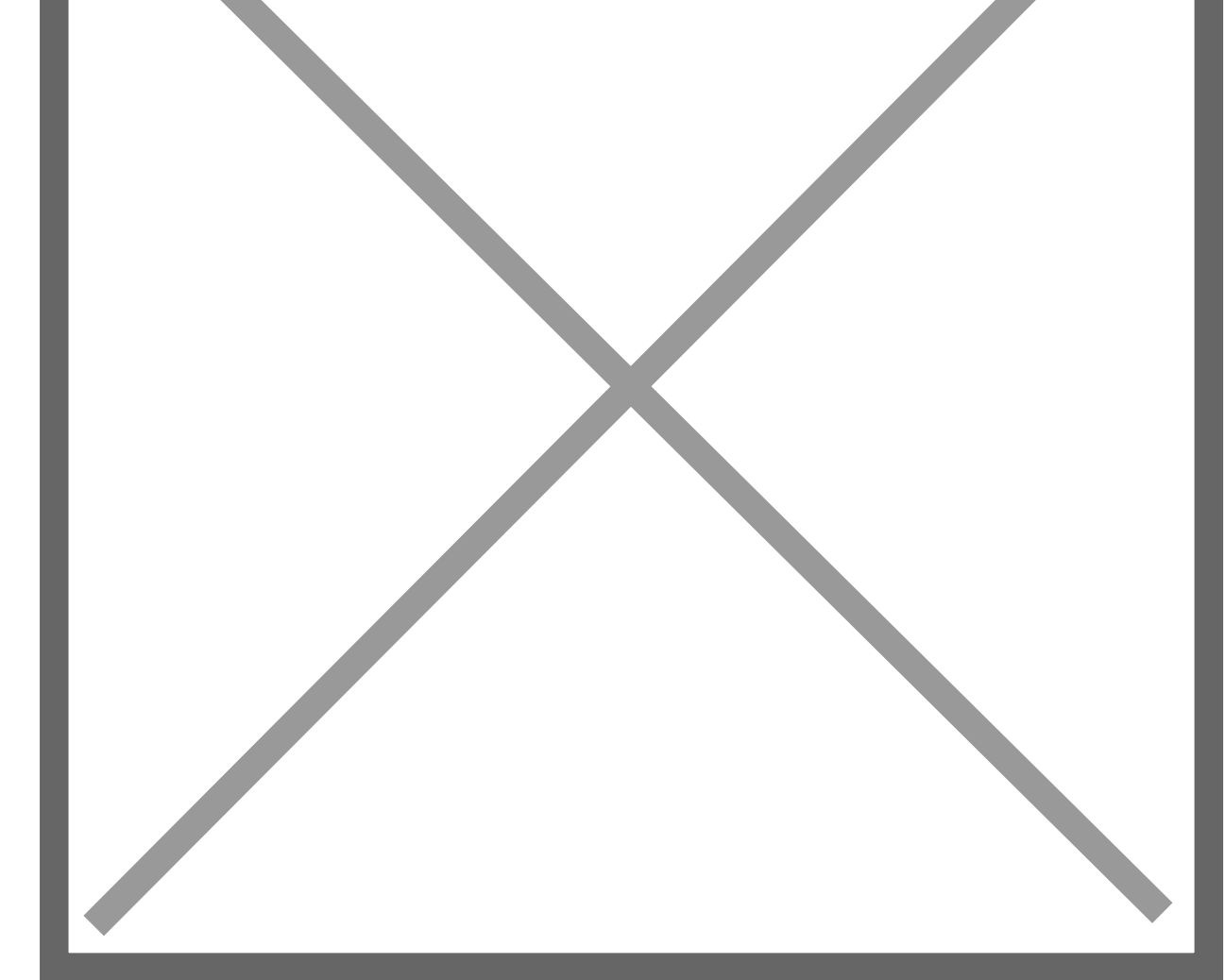
Region: Search per Region

Billing Group: Search per Billing Group

Debtor Status: Search using debtor Status

Create New Session

Webstar > Activity > Time Log to invoice Search



Please Note :

Support Log Number in Red indicates that there is an open Support Log linked to this Time Log.

Support Log Number in Blue indicates that there is a closed/completed Support Log linked to this Time Log.

Invoice Time Log Help

This process allows the user to convert Time Logs to an Invoice.

(Only Time Logs that have been flagged Invoice will be selected for processing to an invoice.)

The window is divided into the Selection Criteria and the Processing Criteria.

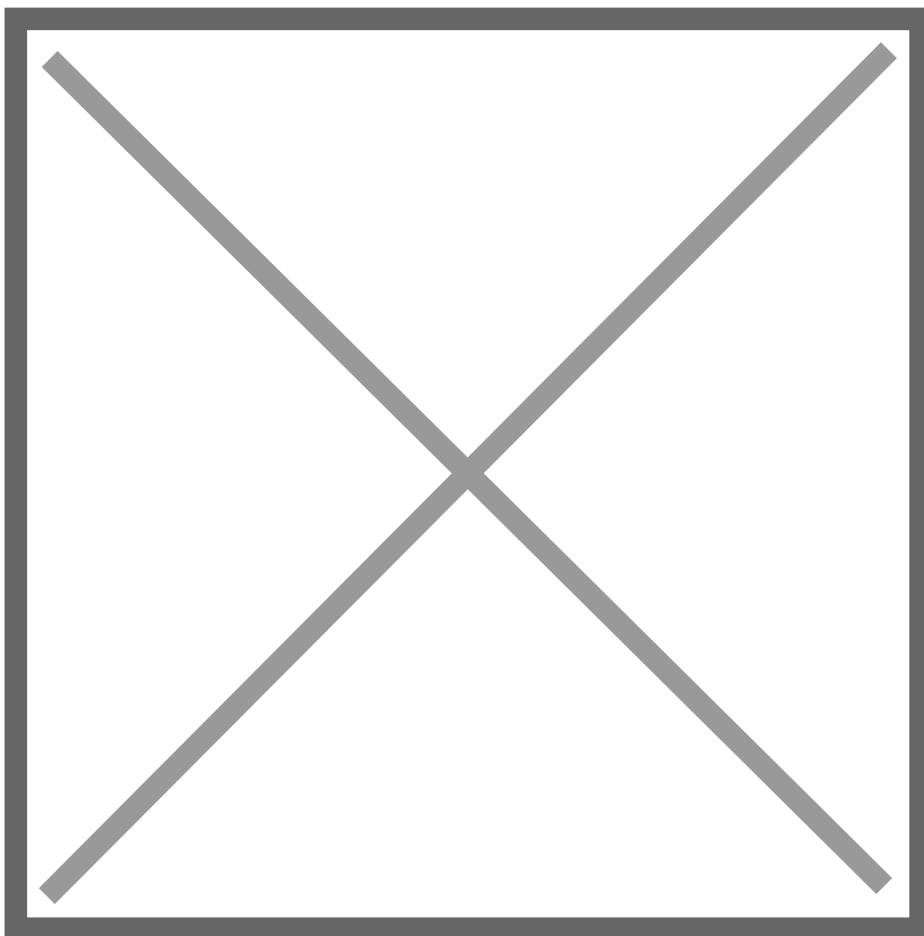
Selection Criteria

The selection criteria entails selecting a Debtor. To refine the selection criteria a Contract can be selected and to further refine the selection a Task can also be selected.

When first starting to process Time Logs to an Invoice, the user will need to click on the Load Session button. All the Time Logs that are flagged as Invoice will be loaded and will appear in the Time Log (Preparation) grid.

A session is created for the selected Debtor and the User.

When clicking on the Load Session button after selecting a Debtor and the warning message



Either click Yes to take over the session or No to Exit.

When clicking on Yes, the user will then be the owner of the session and the previous owner will have to take it back from this user

if previous user wishes to continue processing these Time Log to an Invoice.

On subsequent sessions of processing Time Logs to an Invoice, the user need only select the Debtor and click the Search button.

If the grid does not populate then no session exists for the Debtor and the Logged On User and the user will need to click on the Load Session to create a new session.

Once the Time Log (Preparation) grid has loaded, the user will see that all items in the grid are ticked as selected.

The Time Log Lines can be all selected and unselected by clicking on the Select All or Unselect All button.

Clicking on the Time Log Lines (Preparation) tab will immediately save any changes to the Selected status of a Time Log

and then load all the related lines for the Time Logs that were ticked as Selected

Once the Time Log Lines (Preparation) grid has loaded. By default the Summary Grouping is set to Detail which will list all the Time Log Lines.

Changing the selection of the Summary Grouping will group the Time Log Lines accordingly.

Only Service or Custom Items can be grouped together. The user can switch between the various grouping options.

The column Inv. Value will initially display the same value as the Rate column.

The Inv. Value can be changed and the difference between the Rate and the Inv.

Value will be displayed the Diff. column. This change is automatically saved.

When changing Inv. Value when the lines have been grouped will save the Inv.

Value proportionately to the different lines contributing to the group.

The user can then view the grid in Detail and view the distribution per line.

The three total boxes above the grid will update after each change to the new values.

The first two tab are considered the preparation for what values will eventually appear on the resulting Invoice.

There are two printouts available at this stage to view the changes and what the invoice lines may look like.

Should the user set the Inv. Value to zero then when processing to the invoice, zero value lines can be excluded from the resulting invoice.

Additional Time Logs can be added by clicking the Add Time Log button

which will take the user to the Time Log maintenance window where all the detail for a new time log can be captured.

In order to include additional Time Logs to this process it will be necessary to click the Clear Session button then start again by clicking on the Load Session button.

Remember the additional Time Logs will need to have been ticked as Invoice for them to be included in the new session.

A summary view of the Disbursement Values can be viewed by clicking on the Time Log Summary and then selecting the various radio button to view the disbursement values.

The disbursement values are influenced by the Summary Grouping selection.

When all changes have been made to the invoice values this section can be locked by clicking on the Lock Preparation button.

When clicking on the Lock Preparation button, the first two tabs and the Time Log Summary tab will be disabled,

the Time Log Invoice Lines tab will be enabled, the Lock Preparation button will be disabled and the Unlock Preparation button will be enabled.