ECR - Time Logging

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  - Clock In Monitor
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- Time Logging
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  - Details 2
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  - Invoice Line Tabs
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  - Timelog to Outlook Calendar
  - Timelog Time Increments
- User Time Logging
  - User Time Logging Search
- Time Log to Invoice Search
  - Time Log Invoice Search
  - Create New Session

Time Tracker Log

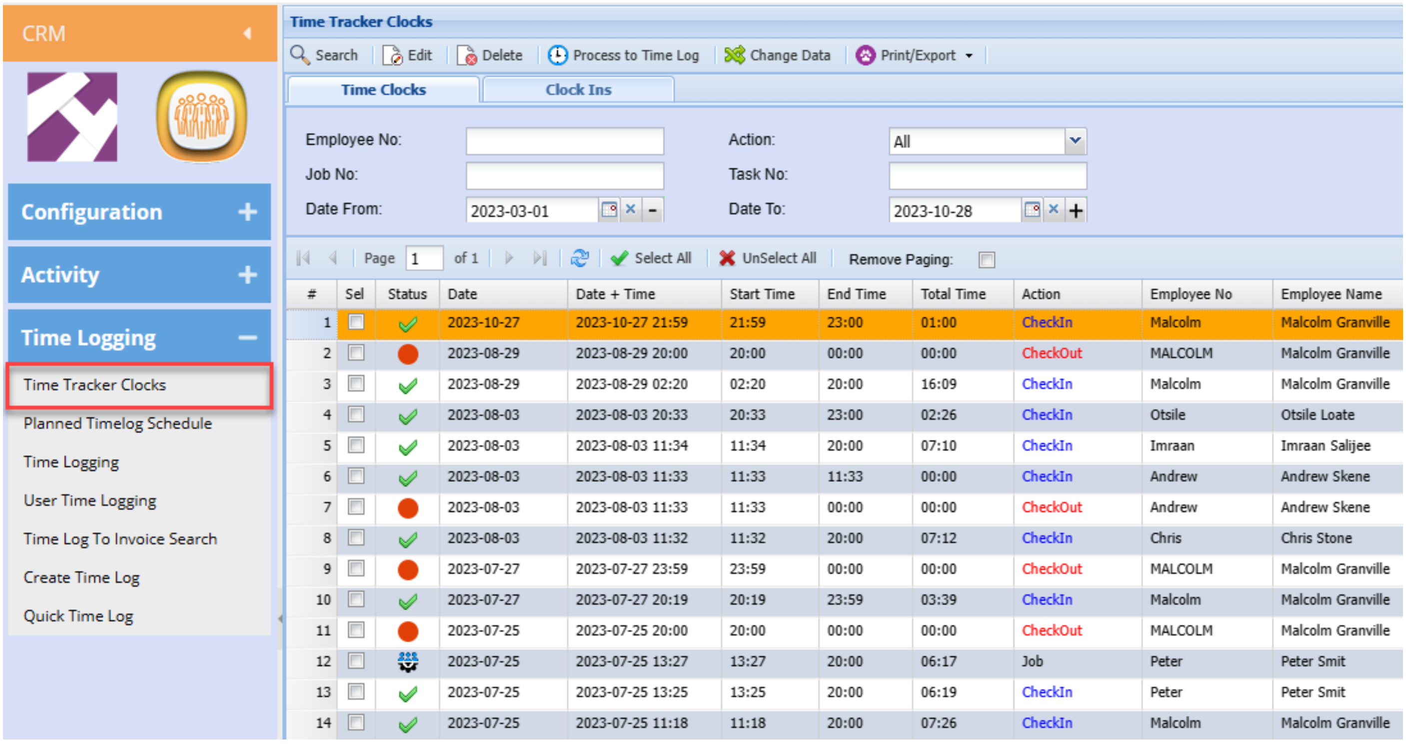
Time Tracker Clocks

Video training manual 2016 - [Click Here]

CRM>Time Logging>Time Tracker Log

Note:

This has moved from System Configuration Module



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

All buttons are at the top of the window

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

Edit button - Edit a selected time log from the grid

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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.

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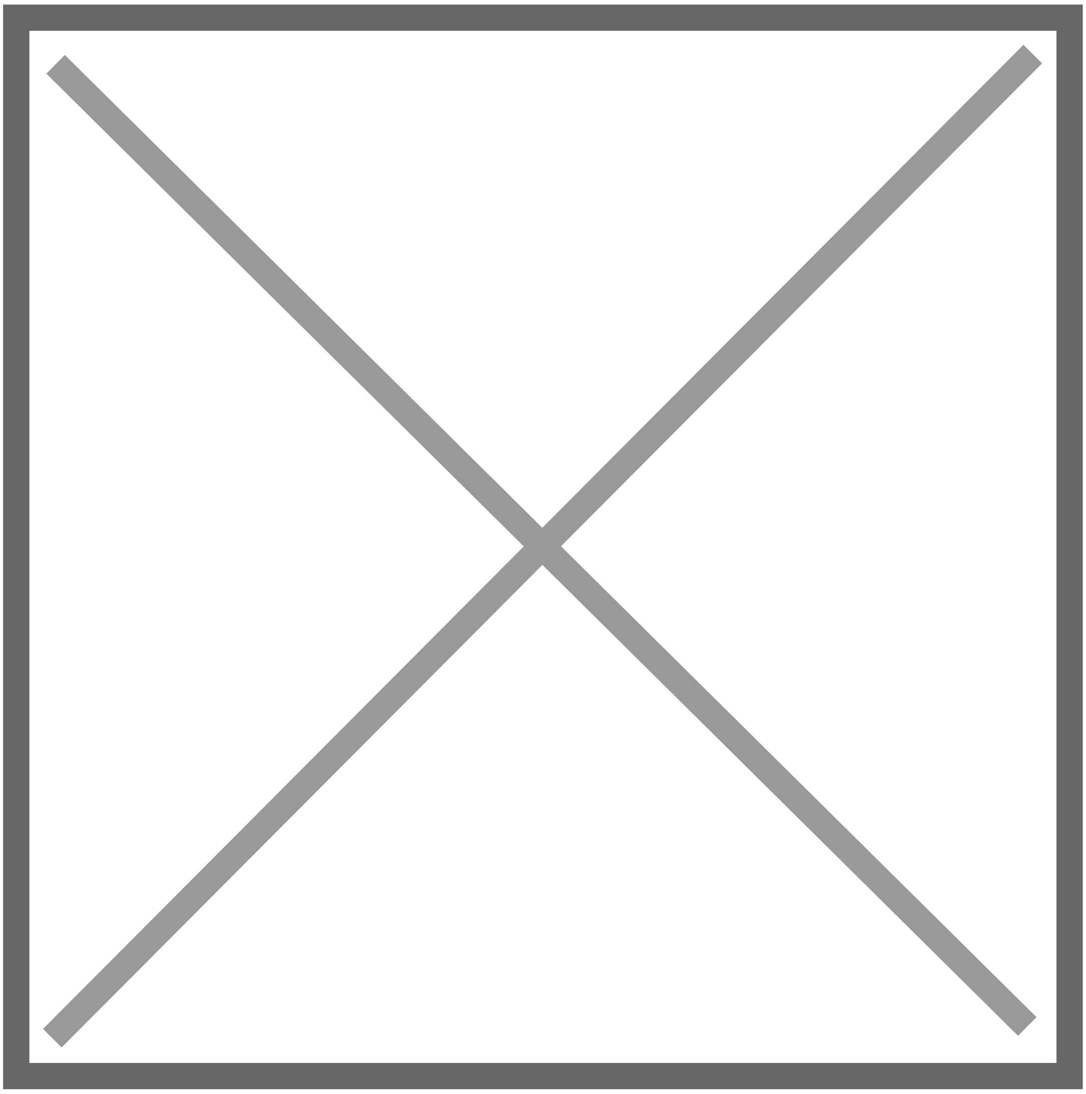


Time Tracker Setups

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

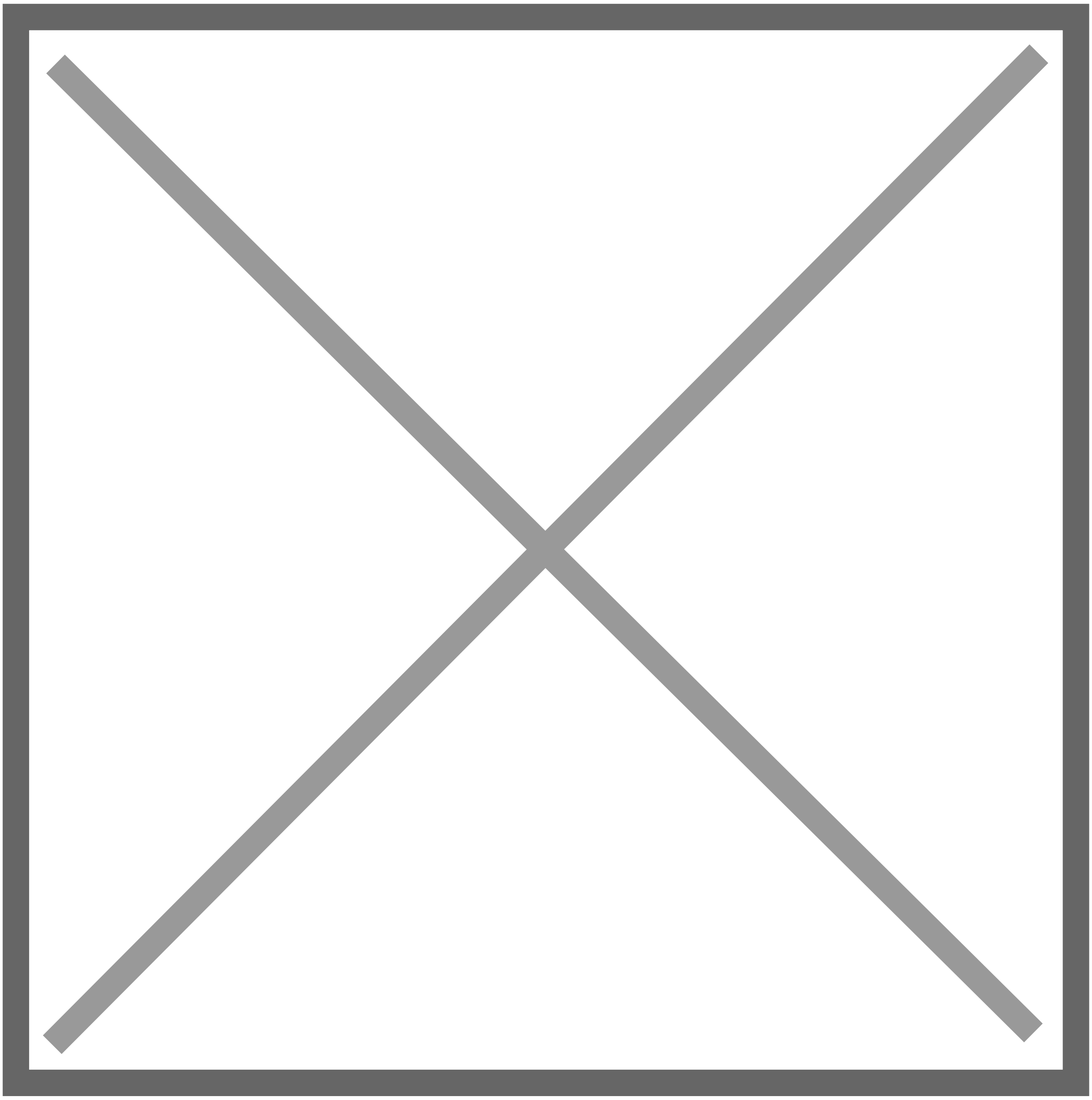
Make sure that Codes are more than 5 characters long and letters need to be in capital

1.User setup with barcodes

2.Contract tasks setup

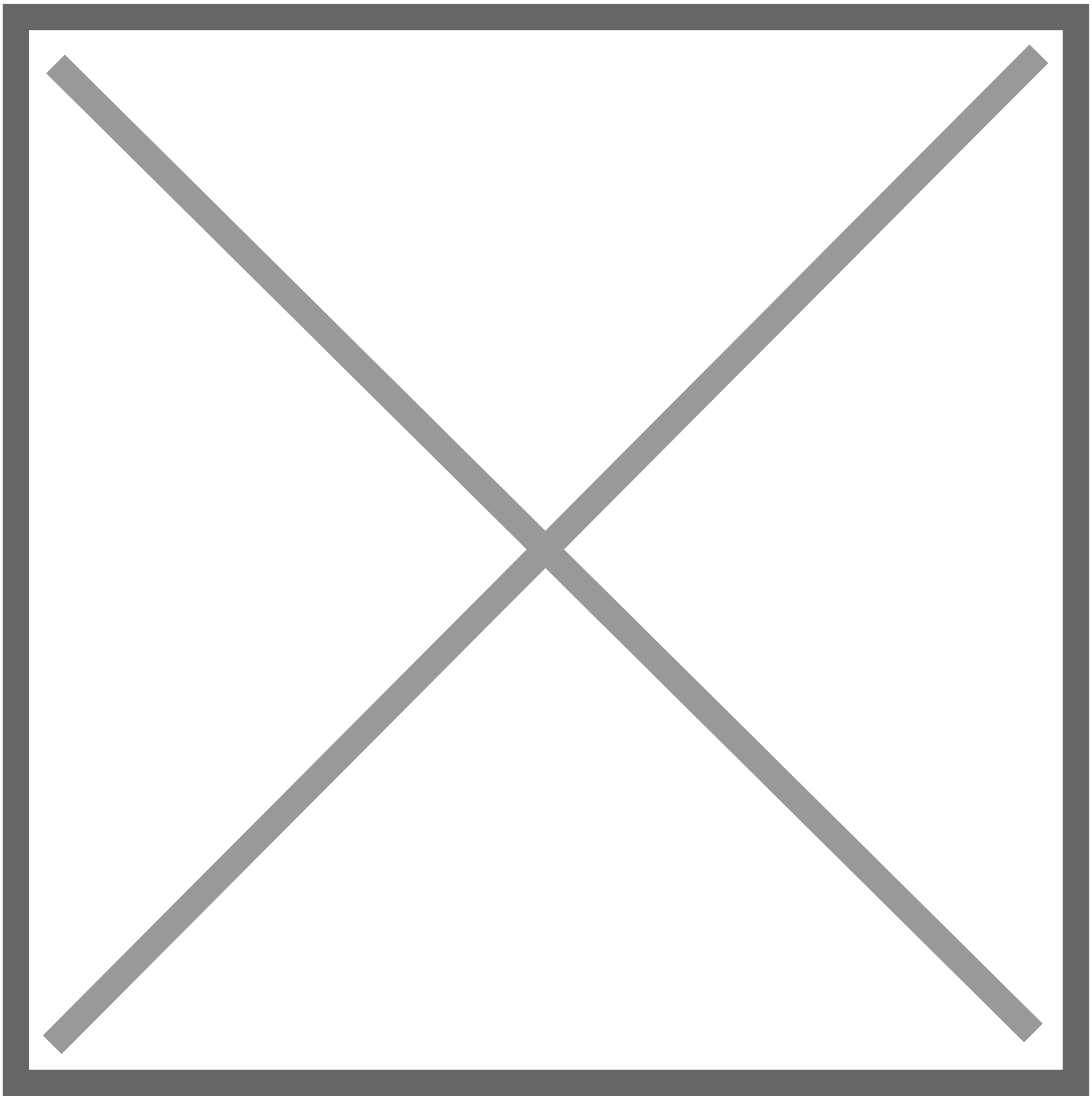
3.Inventory service items setup

Setup your users with Barcodes



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

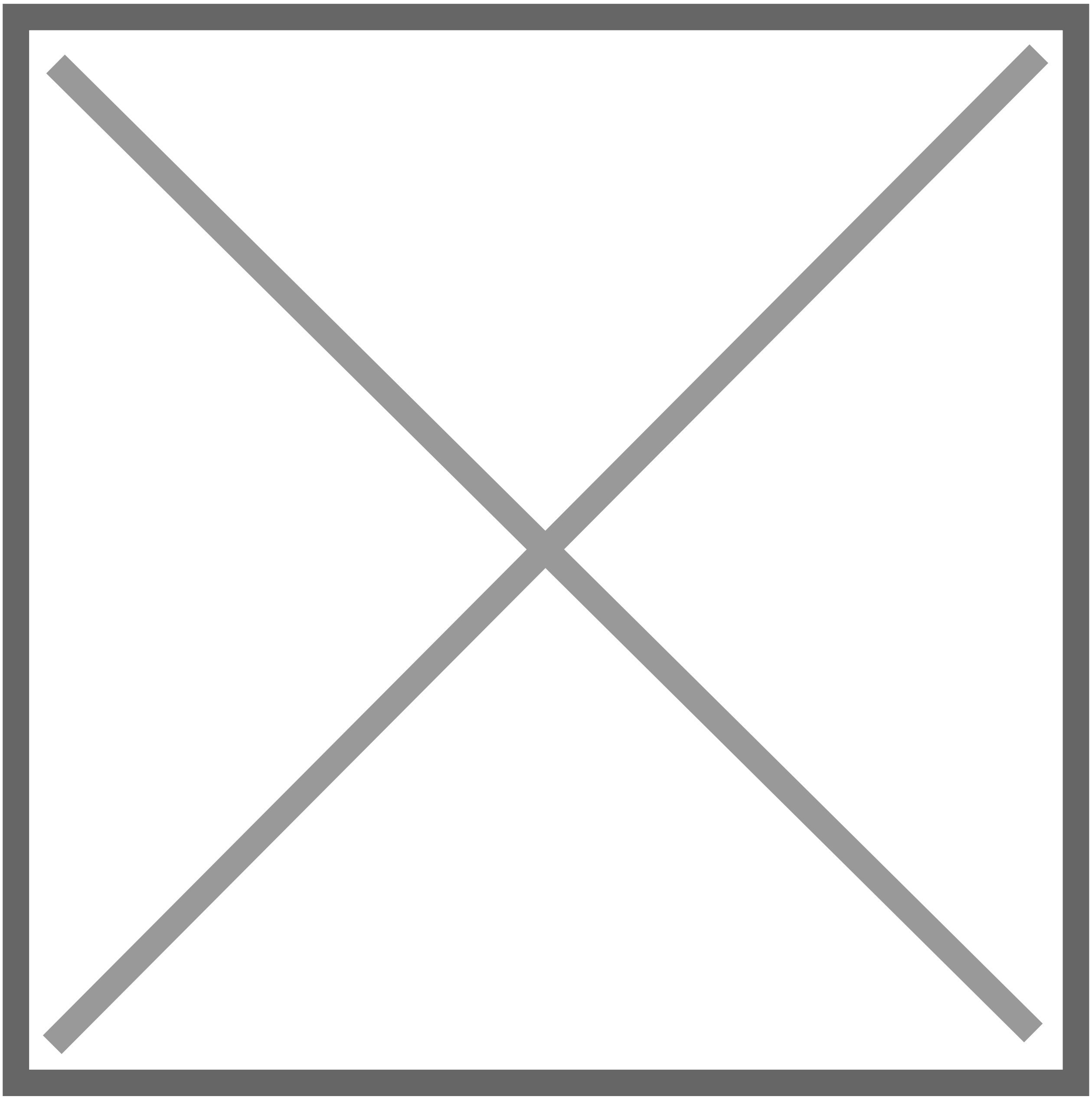
These tasks will be used on the Time Tracker clock



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

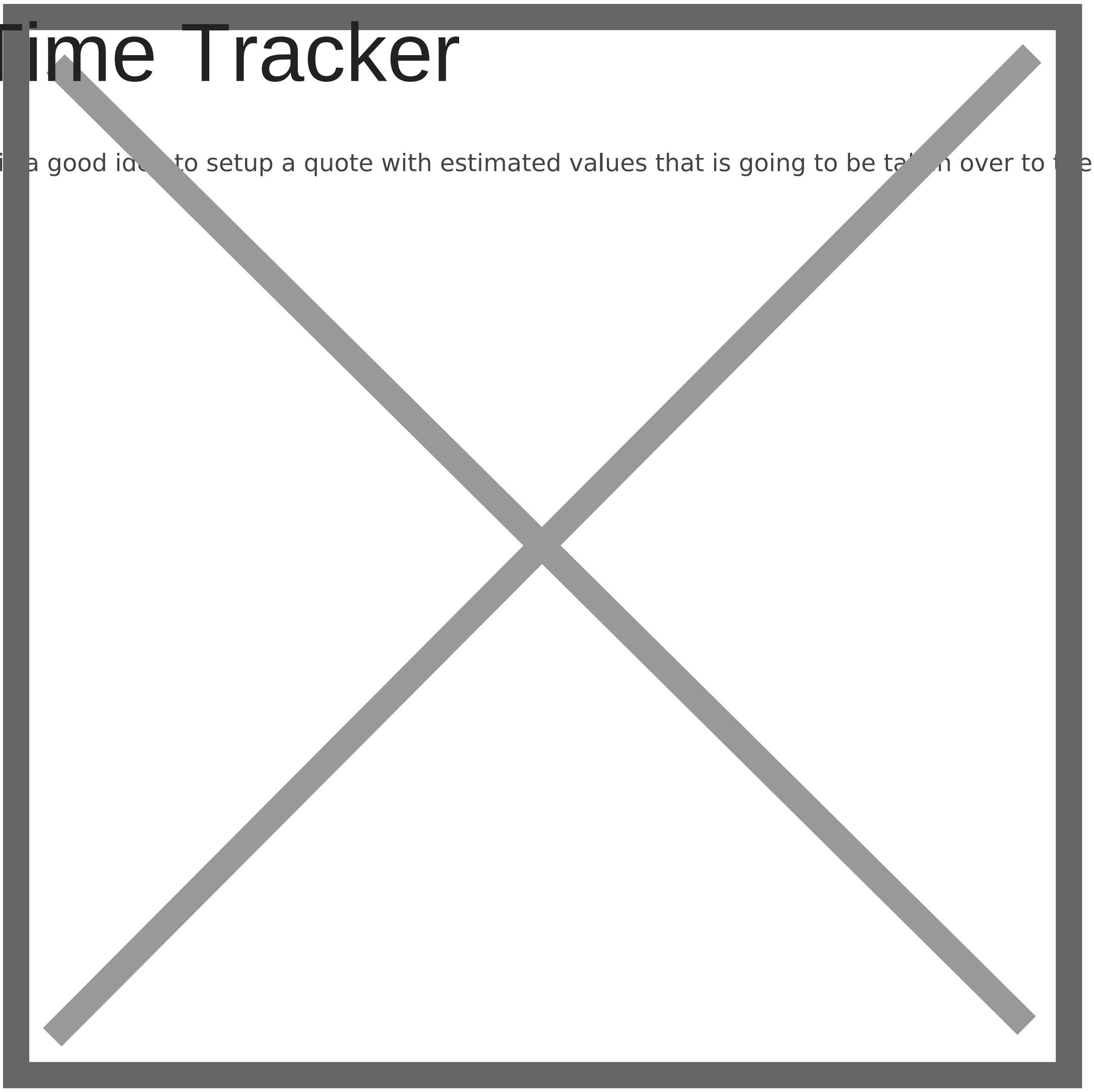
These are used to link the time logs to the specific job line, otherwise it will create a new line on the job.

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



Setup quotes and jobs ready for Time Tracker

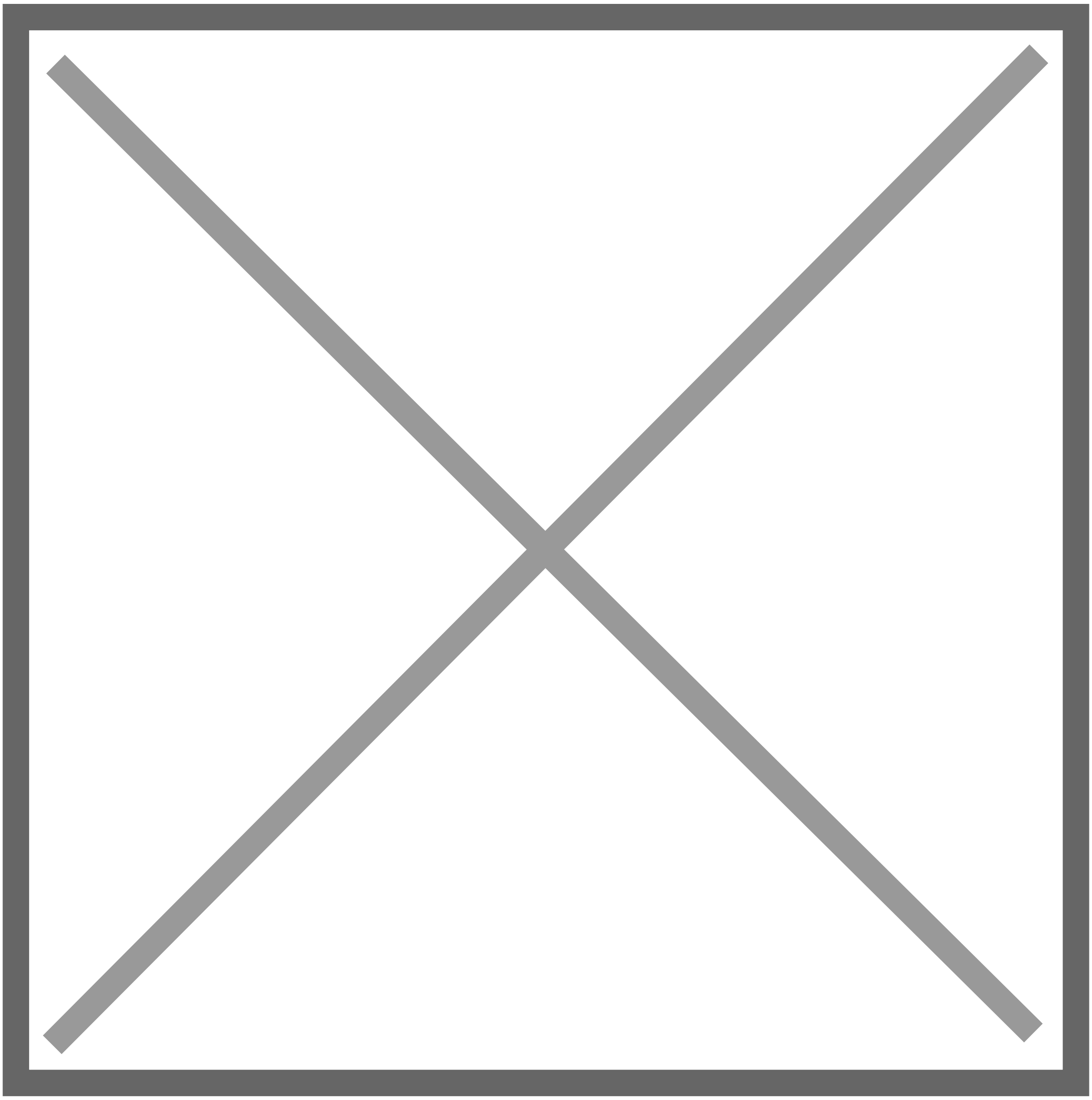
It is a good idea to setup a quote with estimated values that is going to be taken over to the job



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

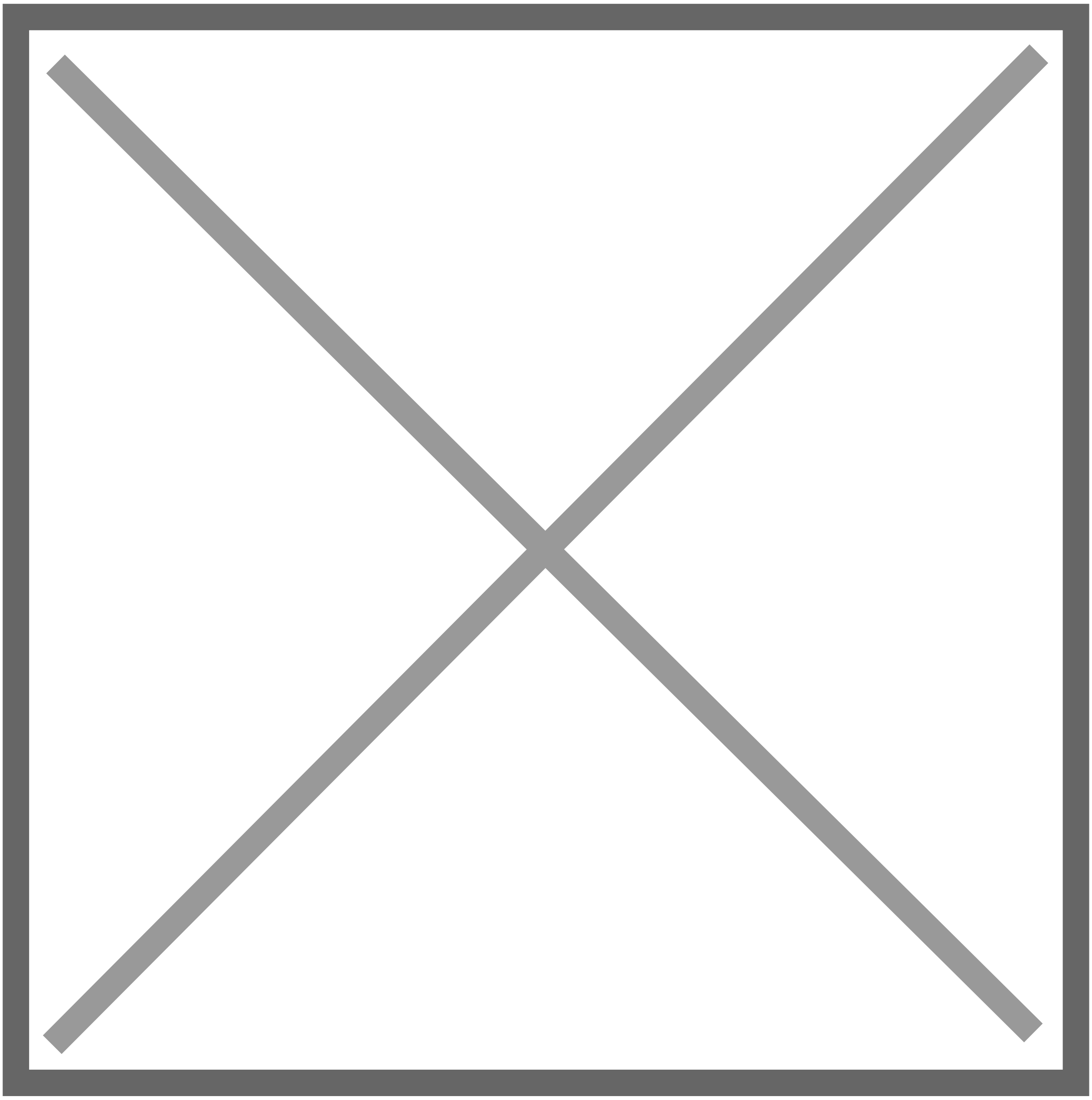
2.Contract tasks to be used

3.Existing active jobs

4.Job Line Links for each job

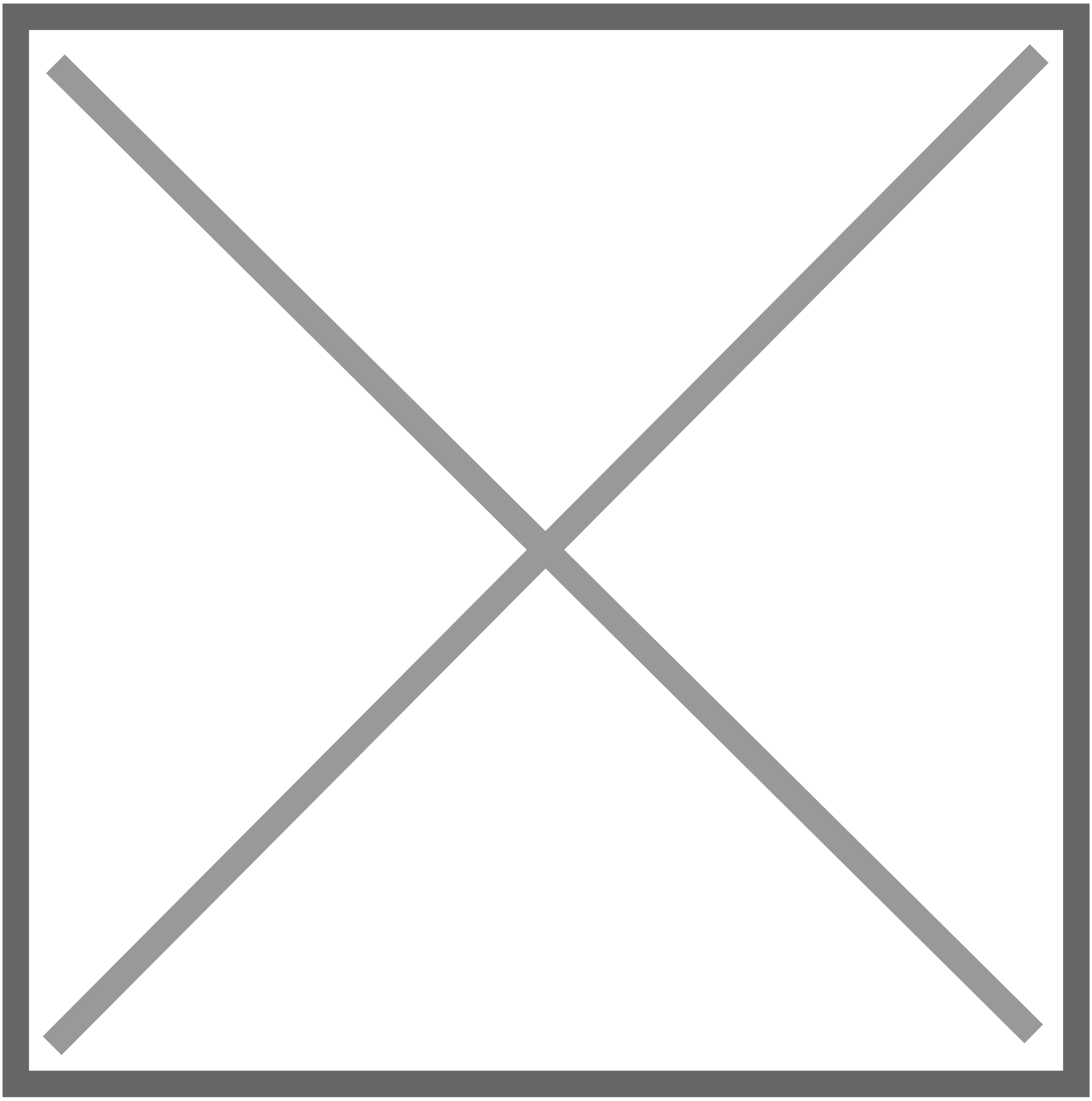
An Excel sheet with barcodes can be used to set this up.

The barcode font39 needs to be installed on your computer



Jobs for the week created print out

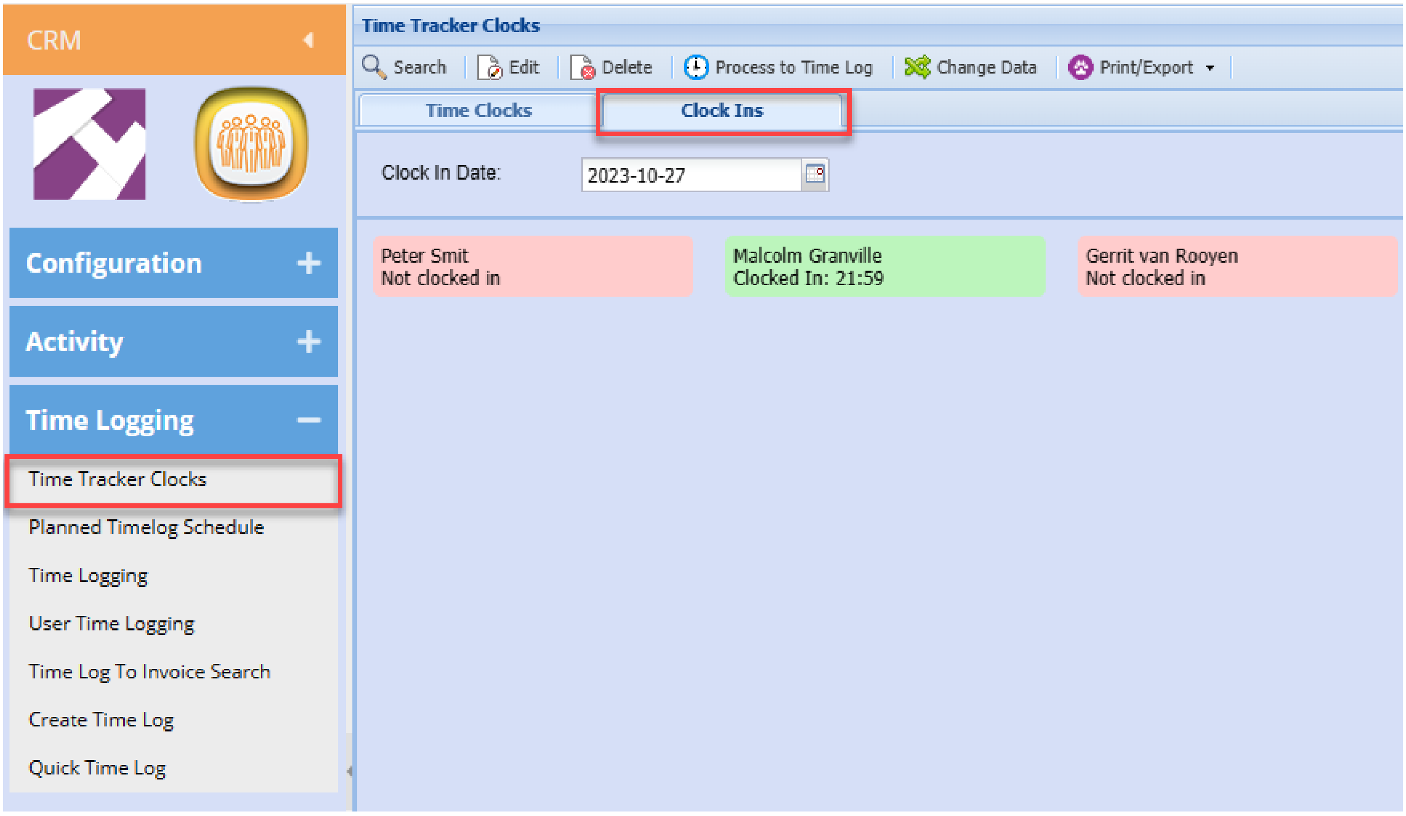
Use the Job barcodes to print out new job numbers with their job line links



Clock In Monitor

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

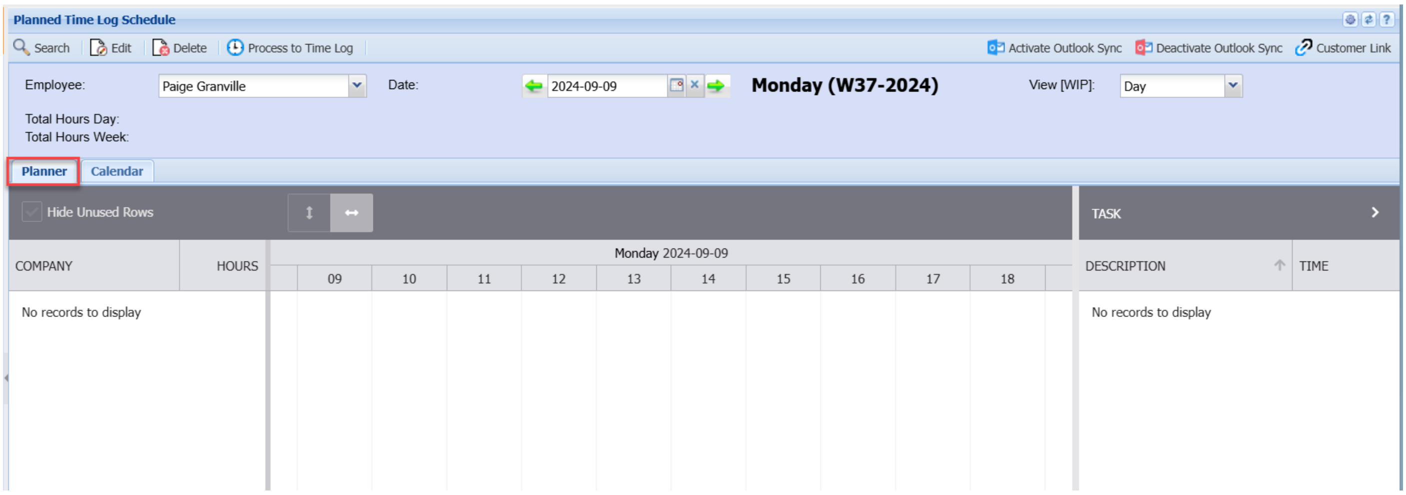
View what jobs the users are working on currently

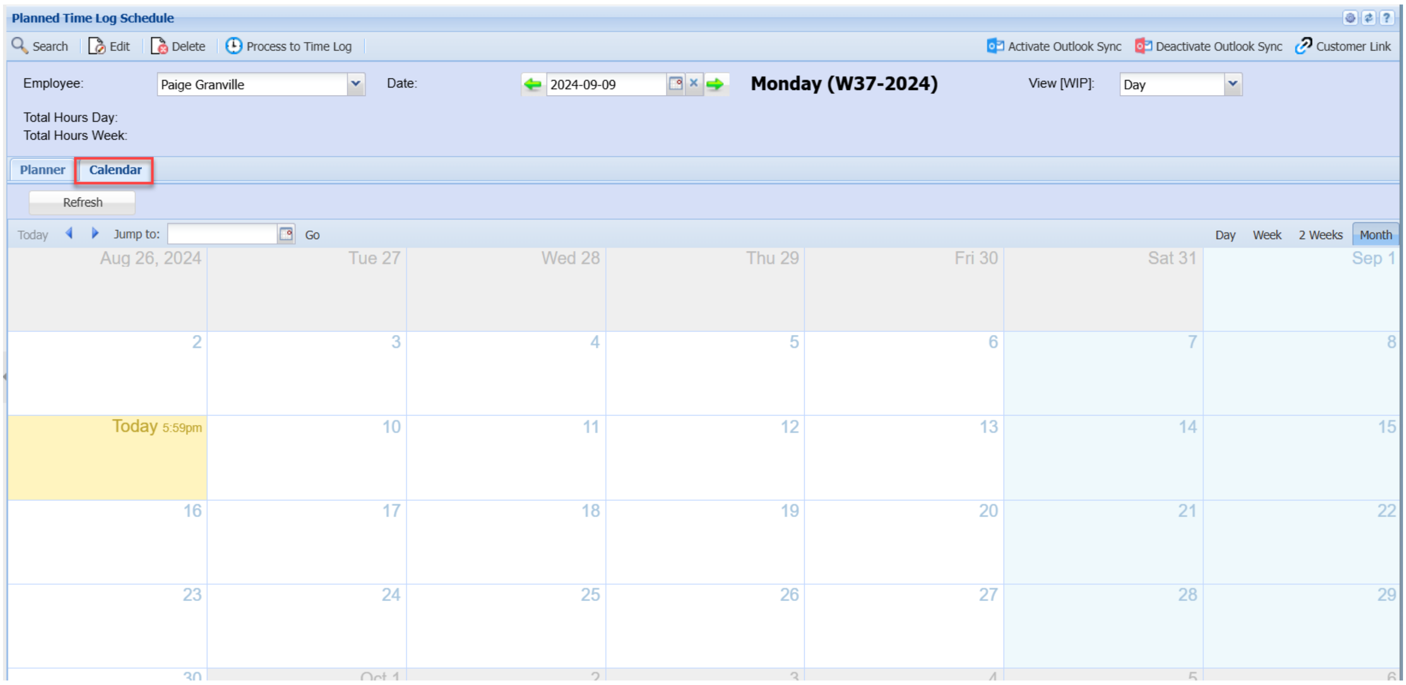


Green	Clocked in for day
Red	Not clocked in

Planned Timelog Schedule

Planned Time Log Schedule Seach





Time Logging

Time Log

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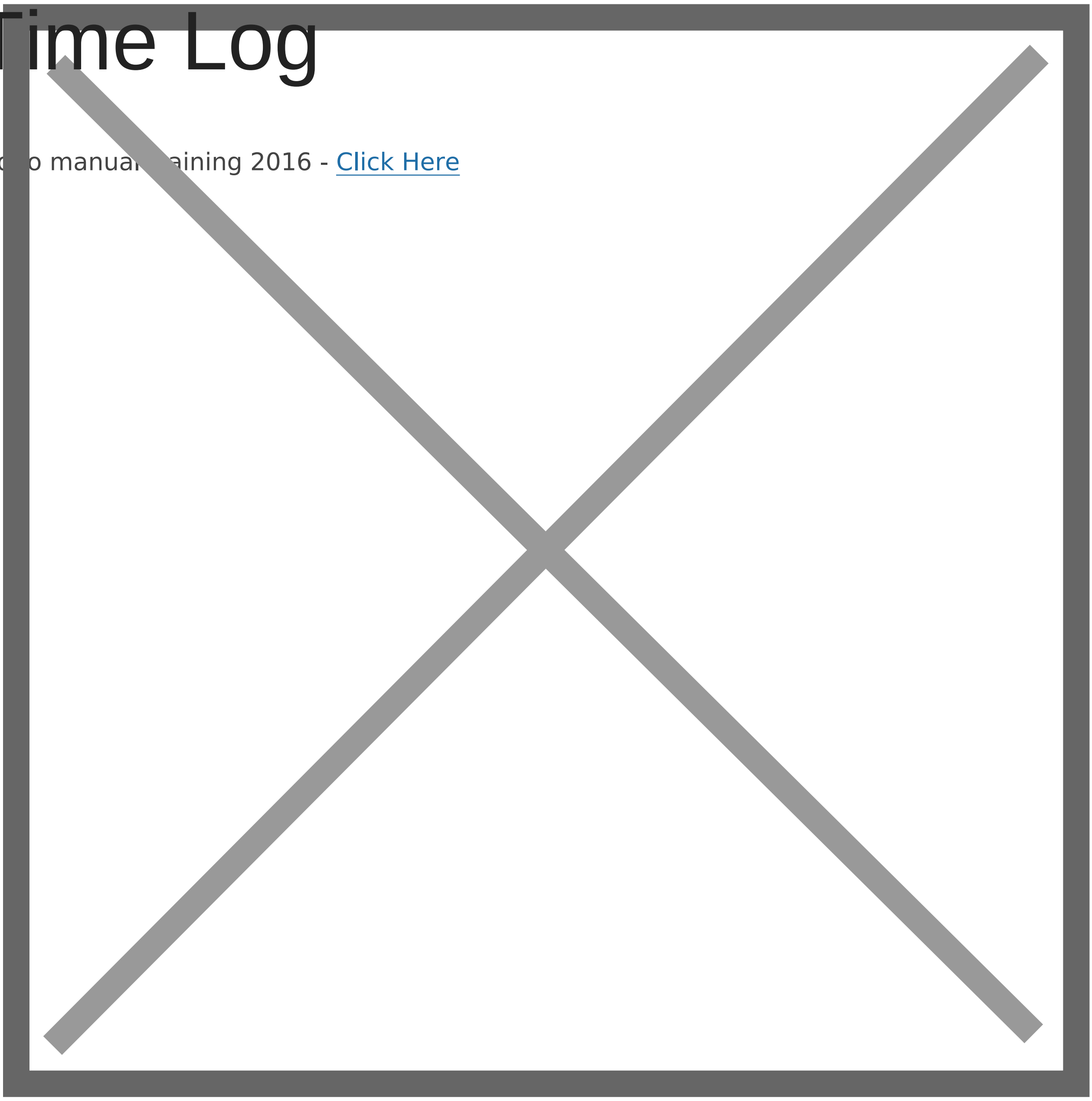

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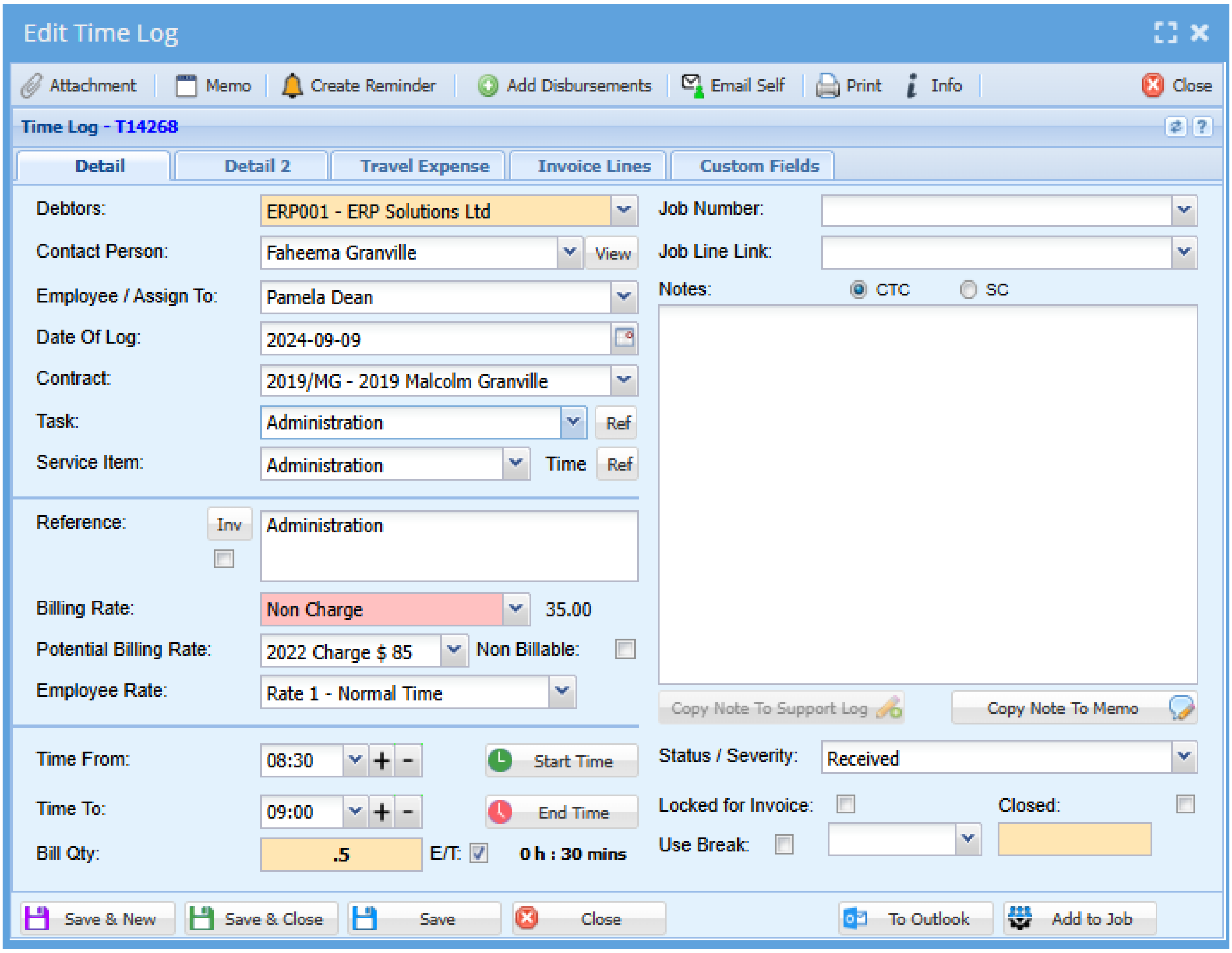
Custom Fields Tab

Select the category rom the drop down arrow

Time Logging

Add or Edit Time Log

Details:

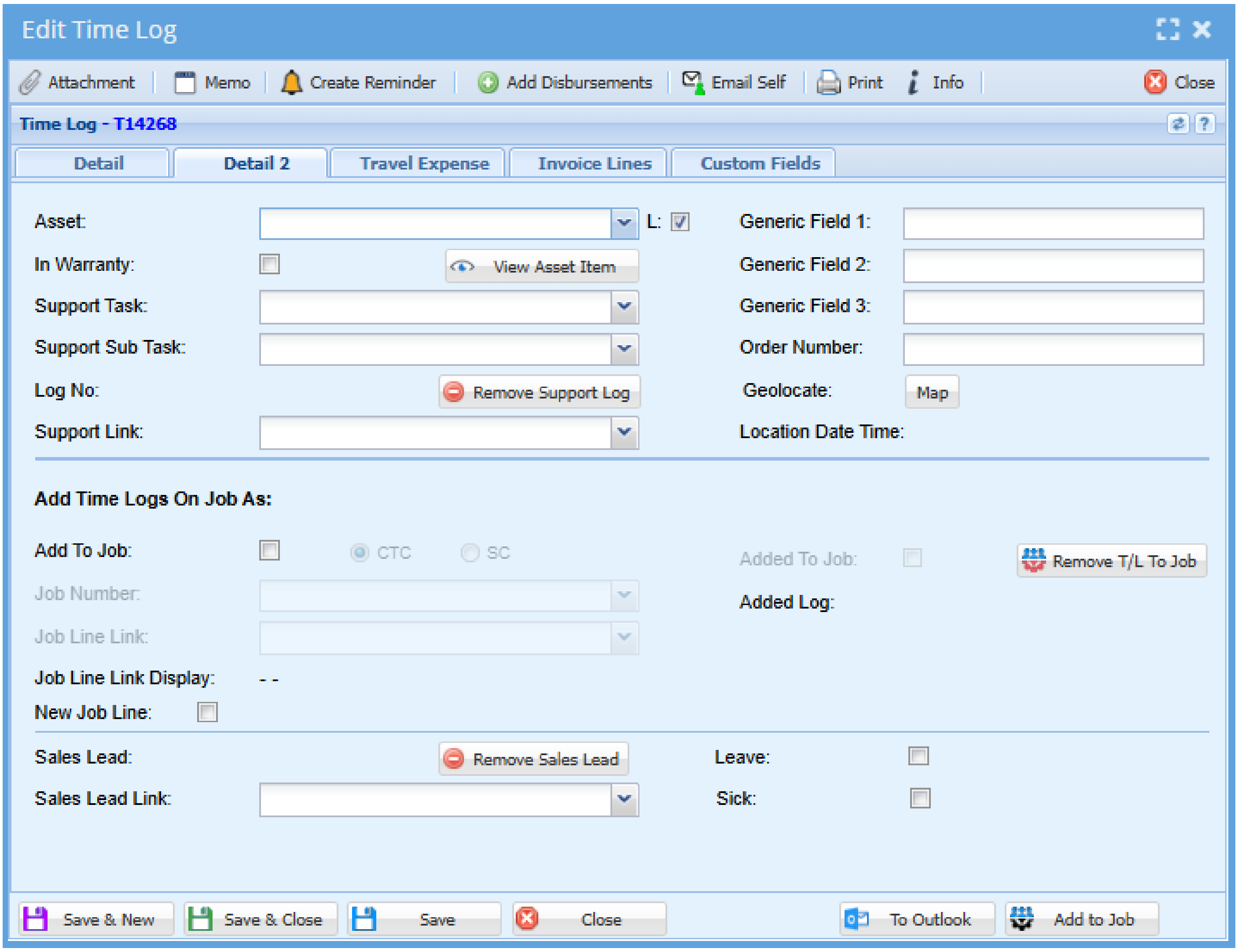


Details	
Debtor	Select the debtor
Contact Person	Your Superior/Manager
Employee	Select the employee responsible for the Time Log

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	Tock 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	

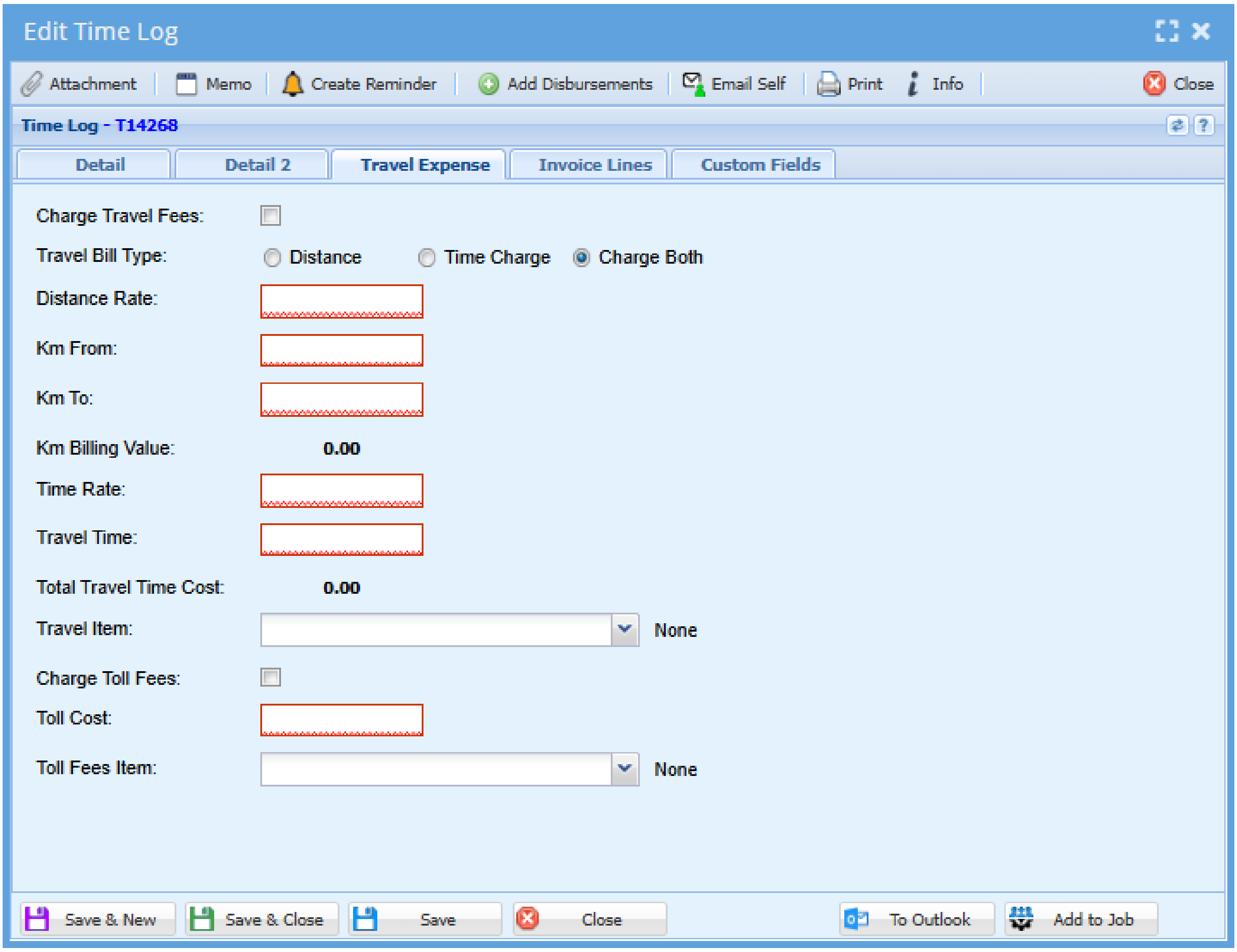
Details 2



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

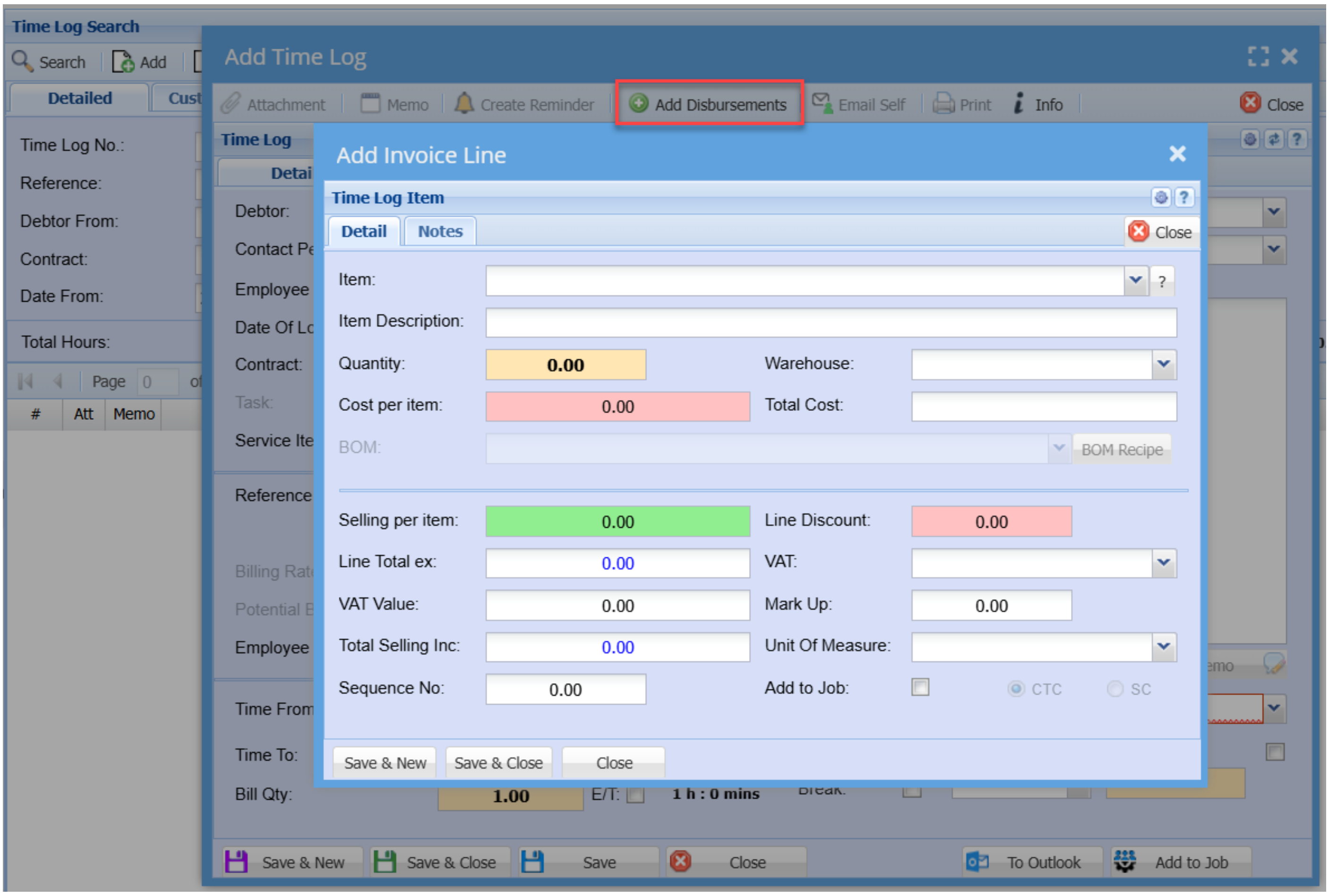
Support Link	
Generic Field 1-3	Text field to add your own note
Order Number	Should you have received an order number for the task you are doing at this time
Geolocation	Maps to add where you were
Location Date and Time	
Add Time Logs on Job as:	
Sales Lead Link	You can add a link here form a sales lead 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

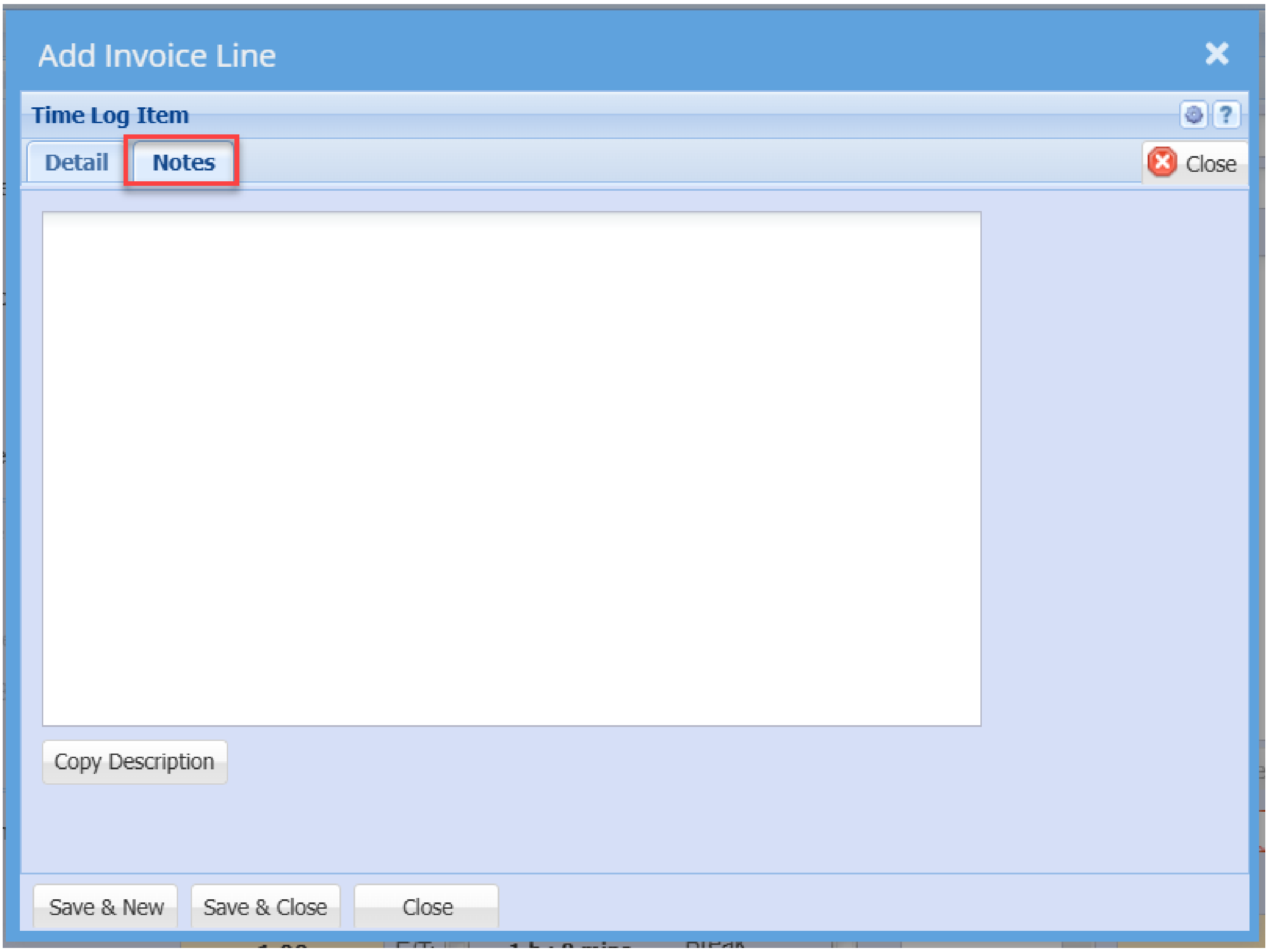
Travel Expenses



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)

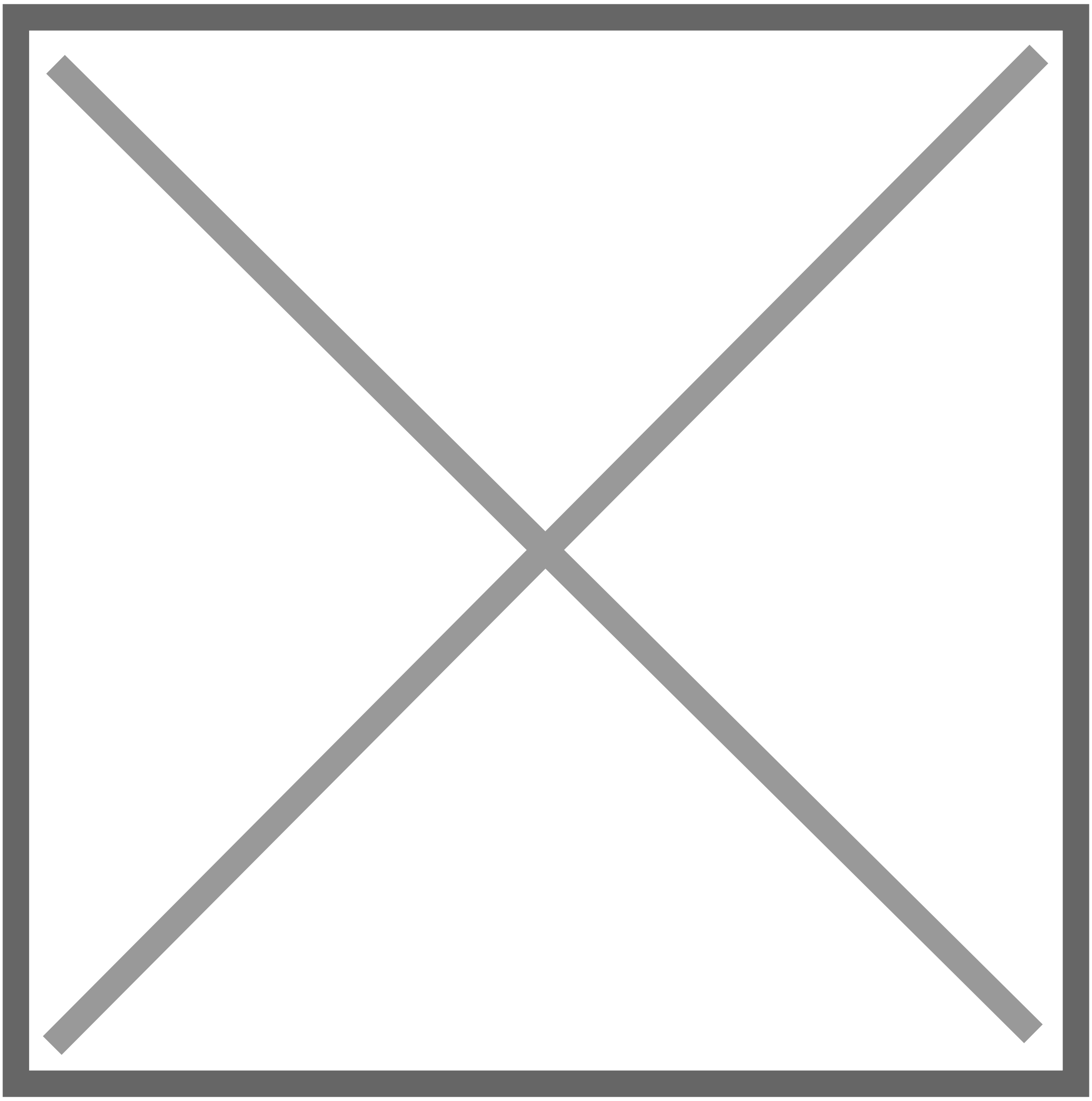
Add Disbursements




Add Invoice Line
Time Log Item
Detail
Notes
Close
Copy Description
Save & New
Save & Close
Close

Details 2

Add or Edit Time Log



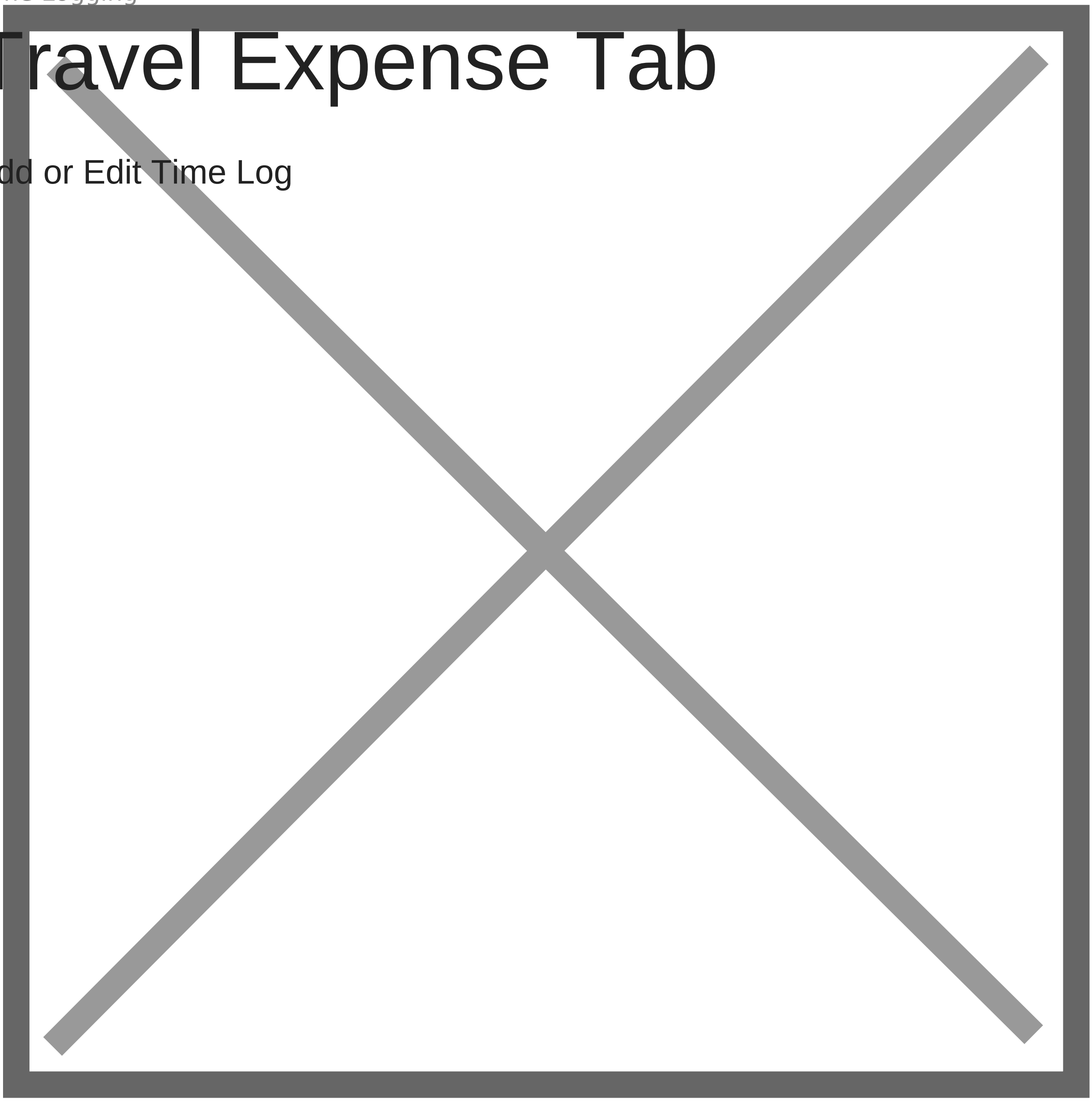
Details Tab 2

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

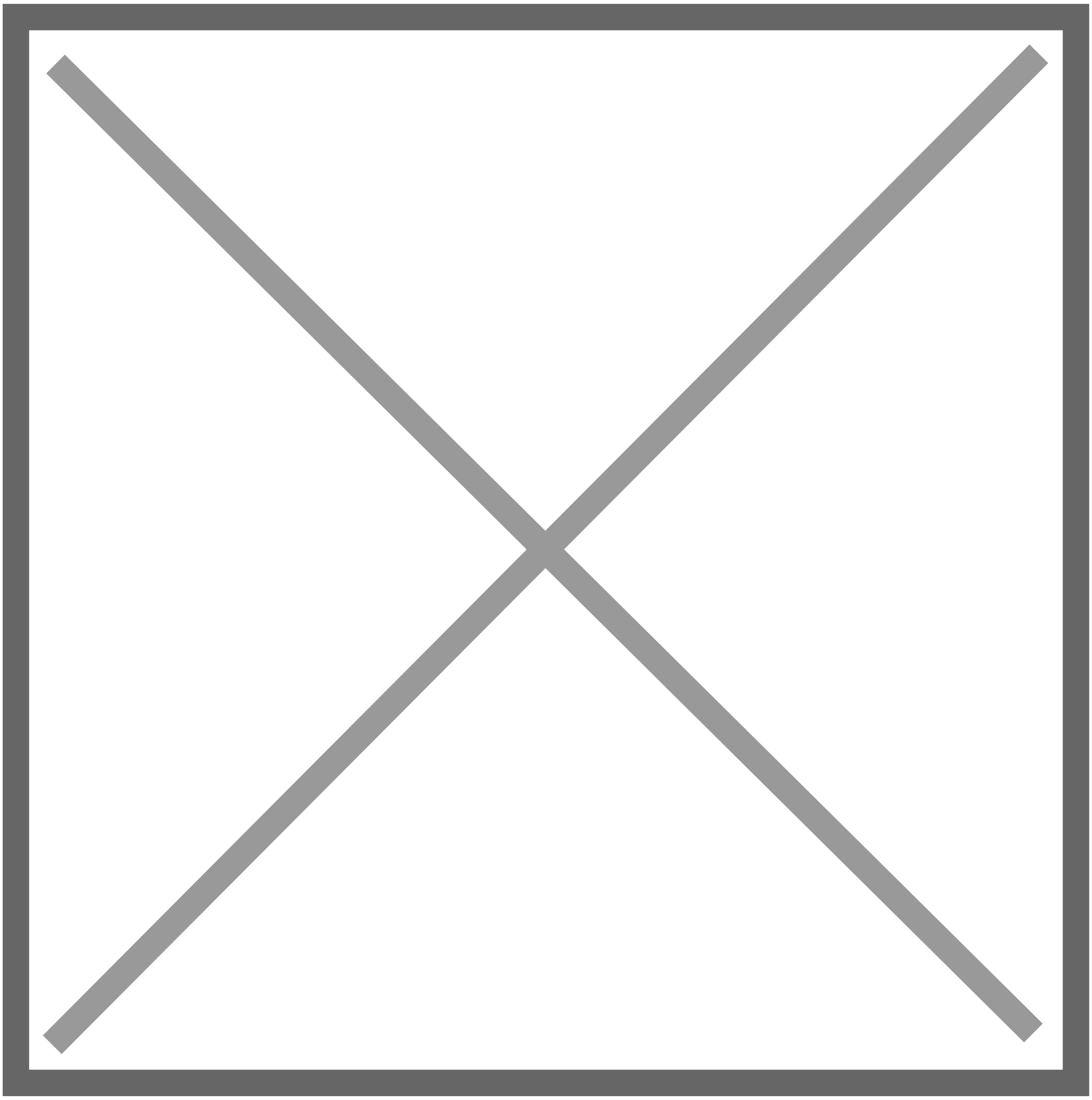


Travel Expenses Tab	
Charge Travel Fees	Tick if Travel Fees are to be charged
Travel Bill Type	Select either Distance or Time Charged

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

Time Logging

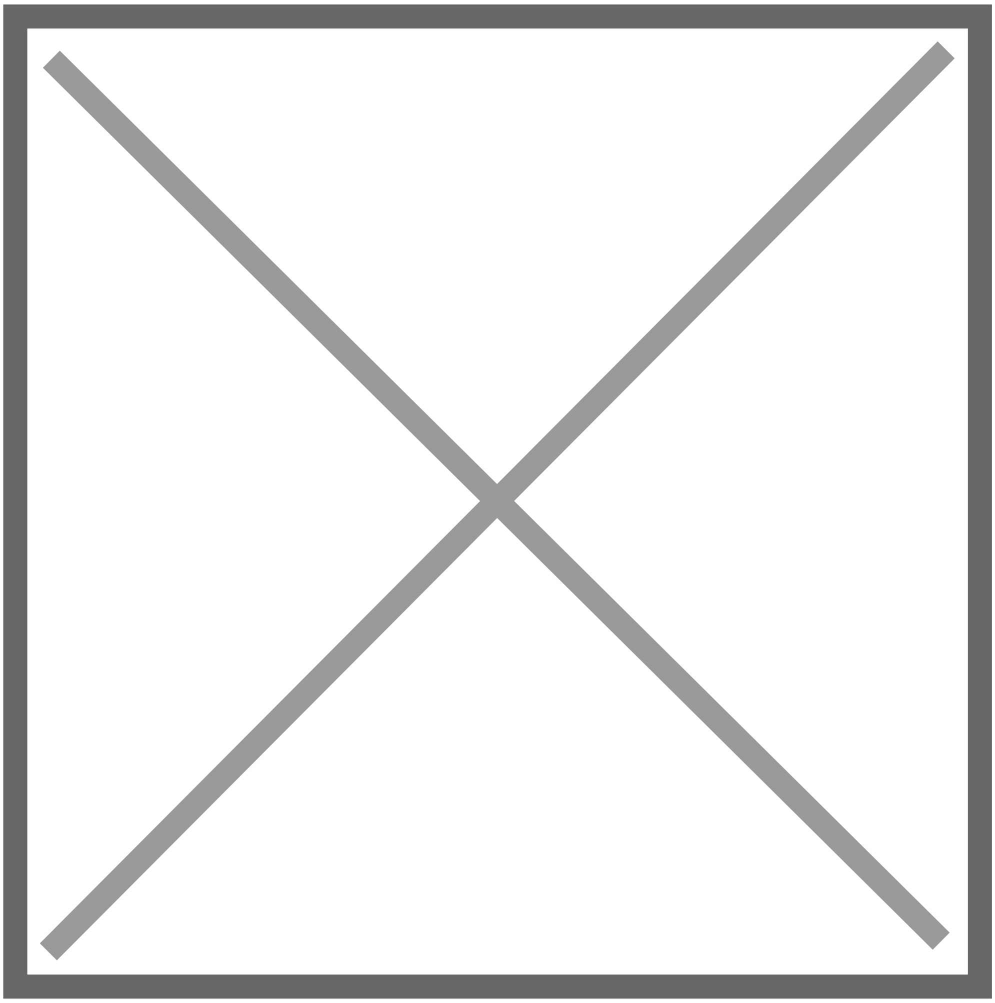
Invoice Line Tabs



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

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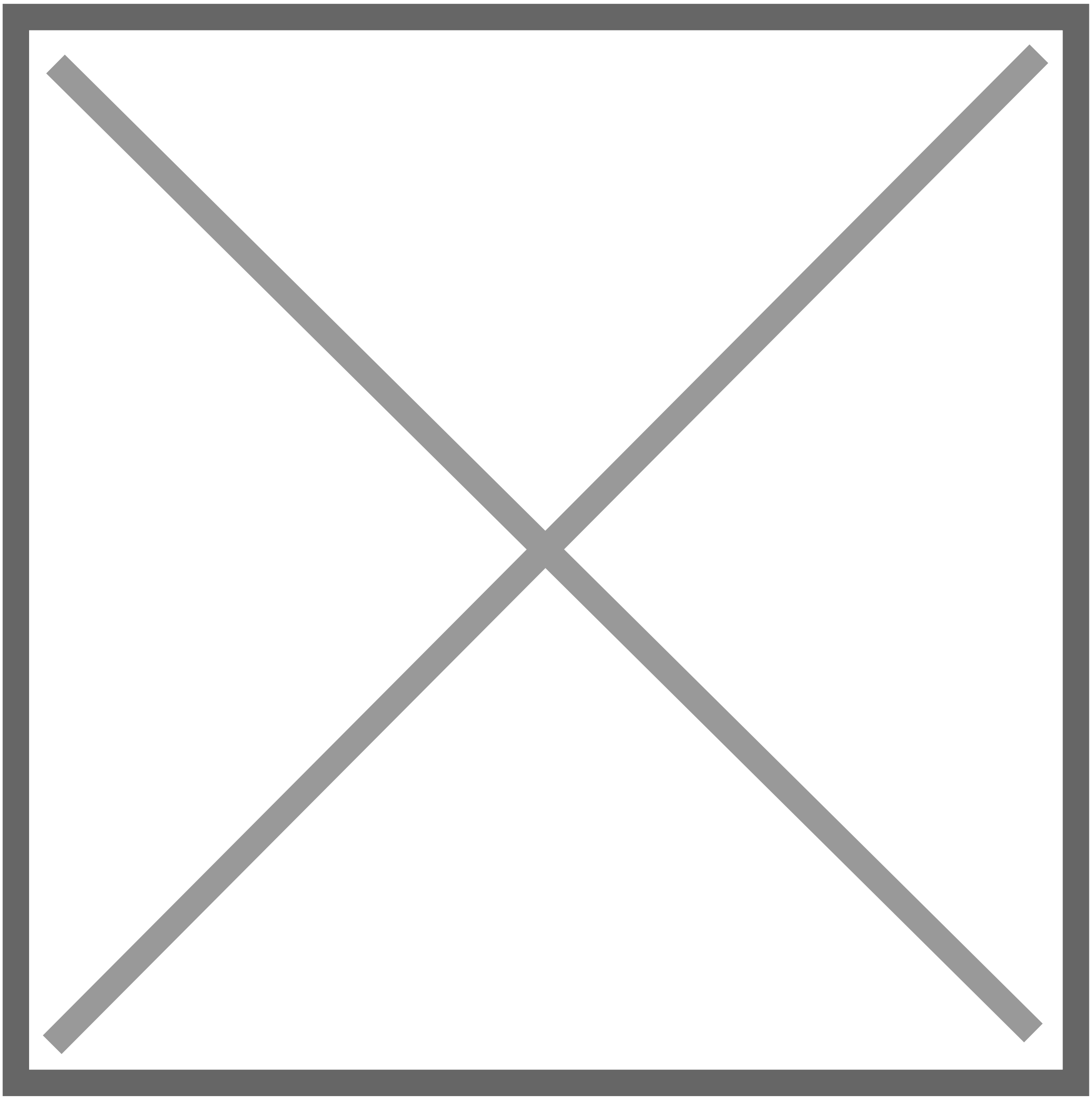
Creating time logs and pushing these to your outlook calendar.

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

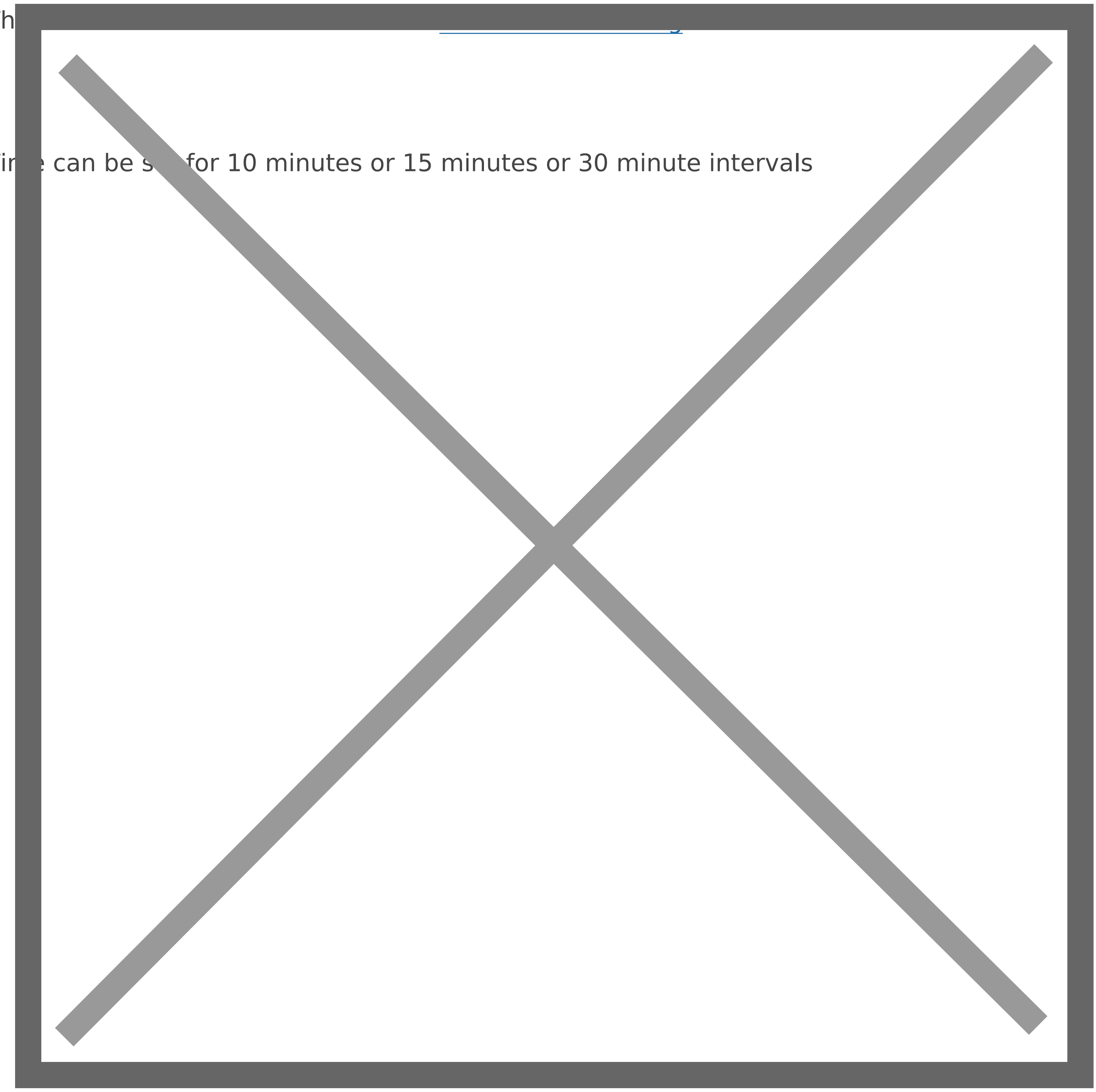
This way your time logs are up-to-date and you reduce having to double enter.



Timelog Time Increments

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

Th

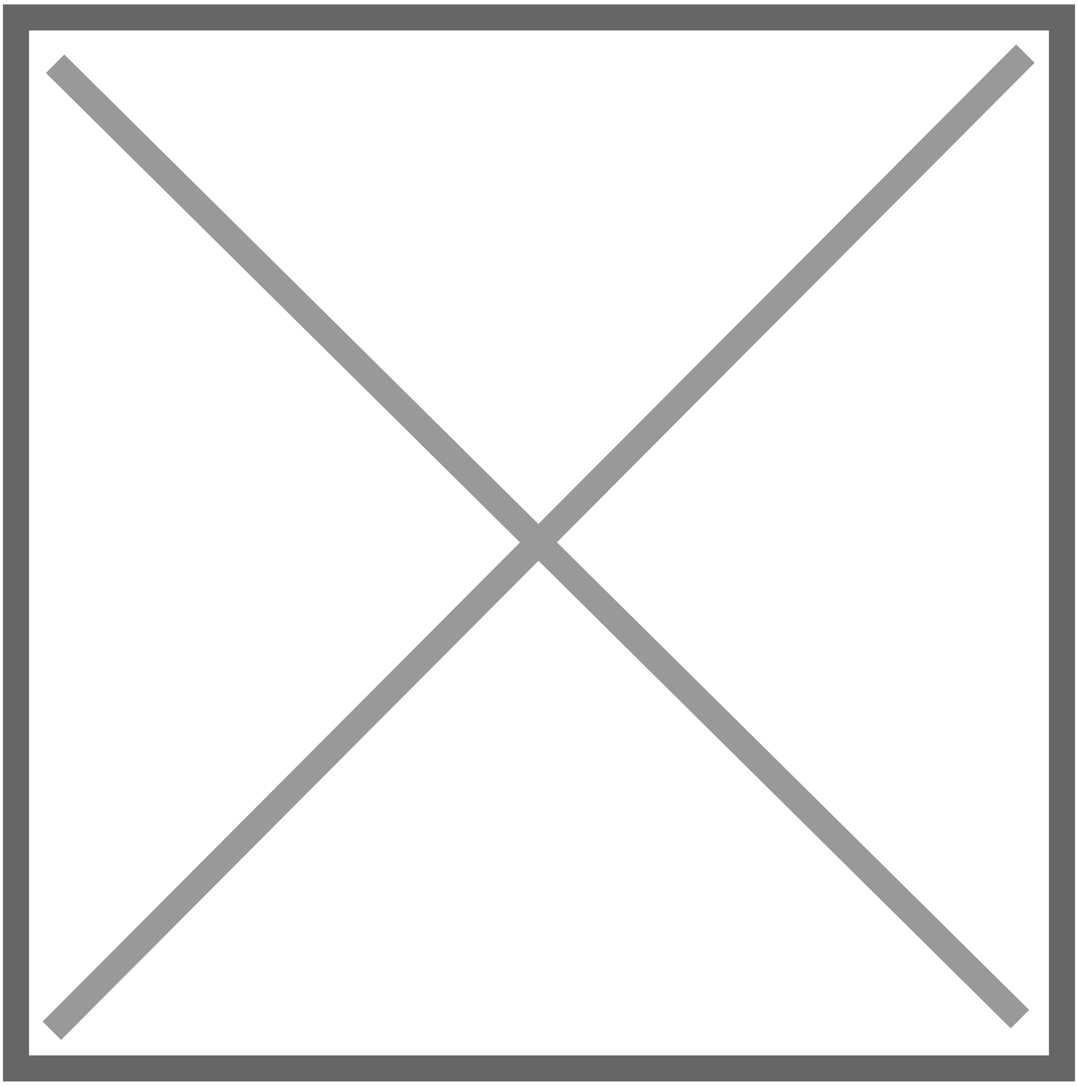


Time can be set for 10 minutes or 15 minutes or 30 minute intervals

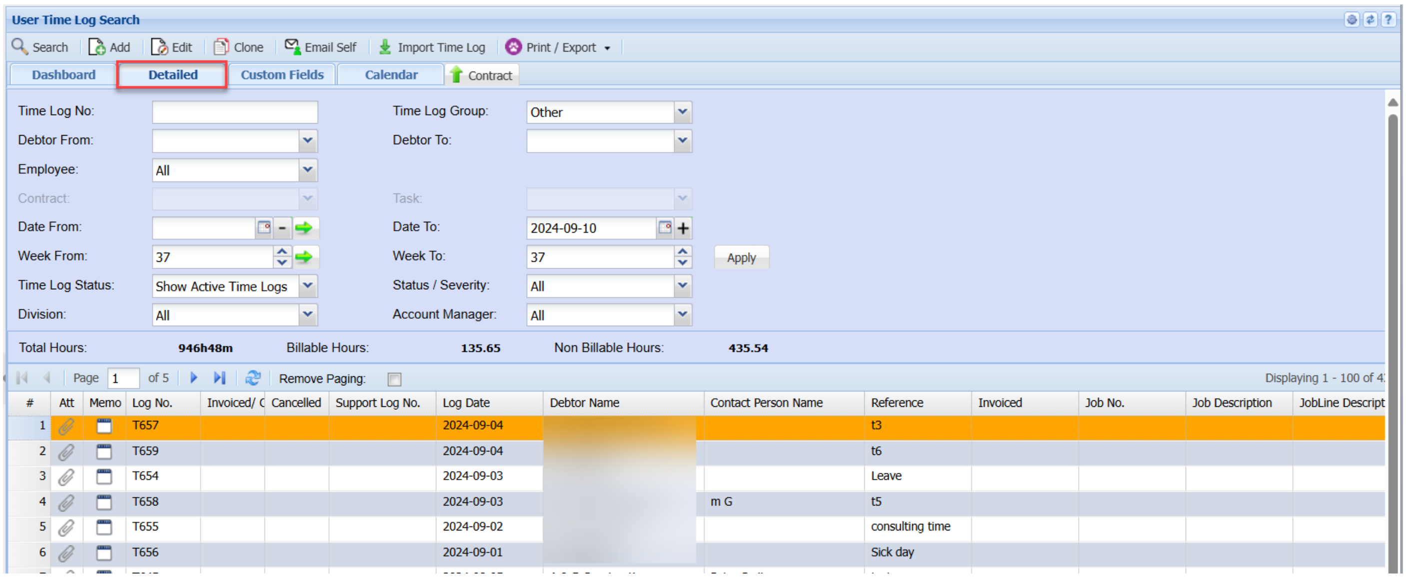
User Time Logging

User Time Logging Search

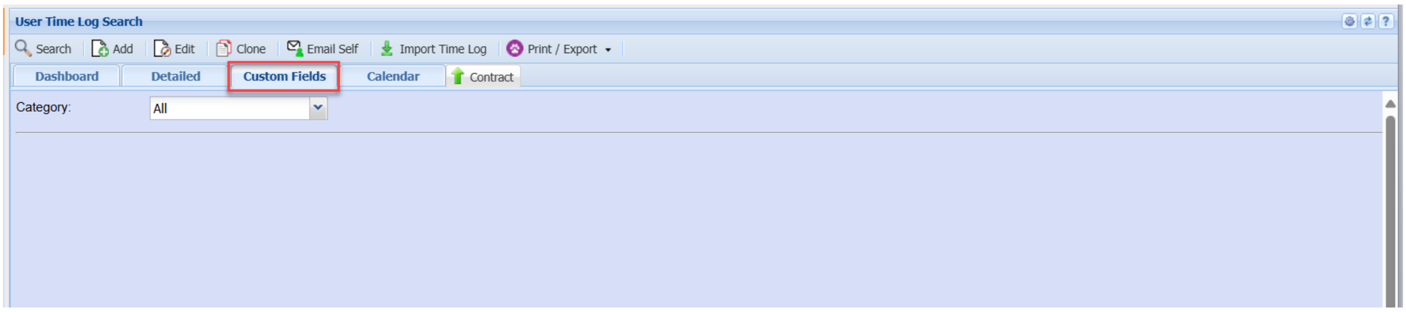
Dashboard Tab



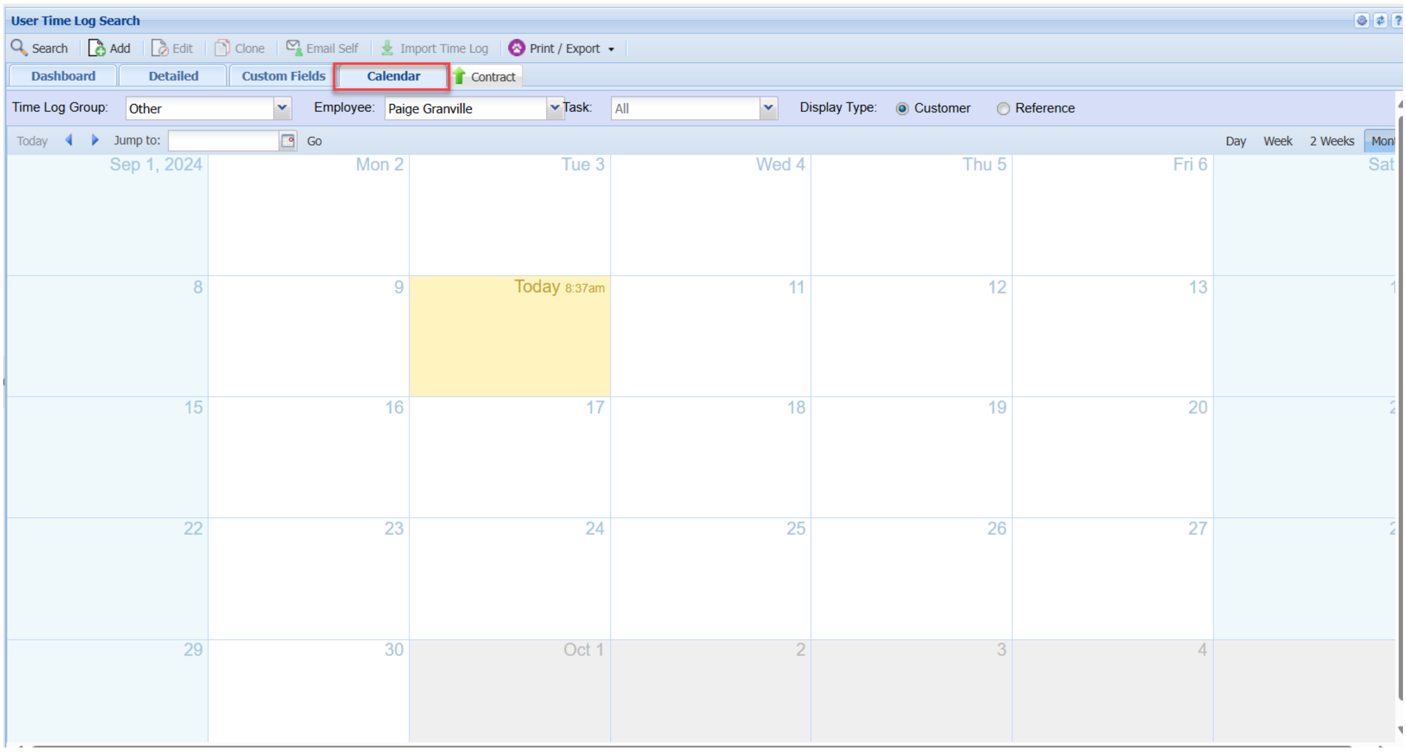
Detailed Tab



Custom Fields Tab



Calendar Tab



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 Invoice Search

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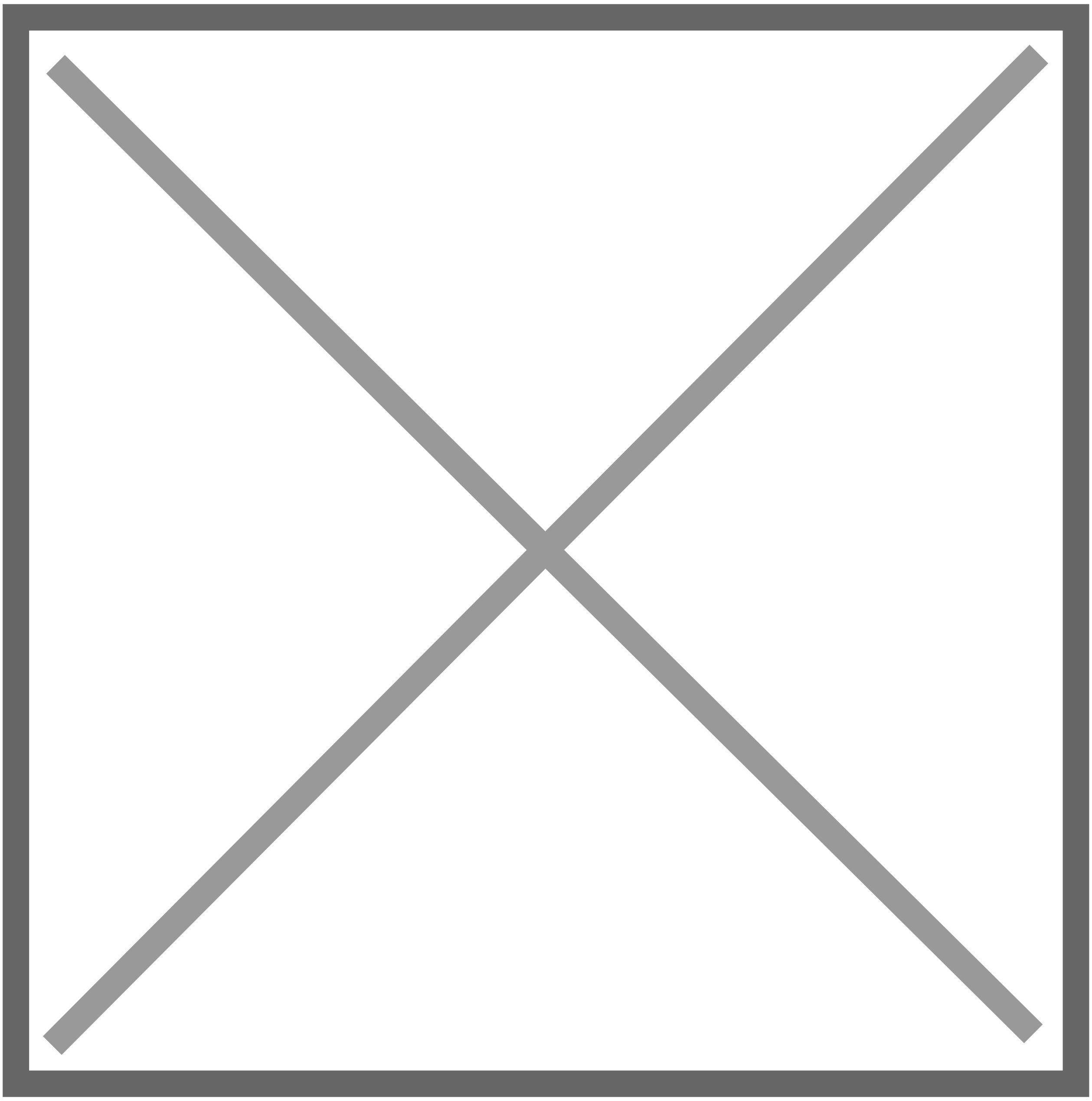
Video manual training 2016 - [Click Here]



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

Webatar > 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.

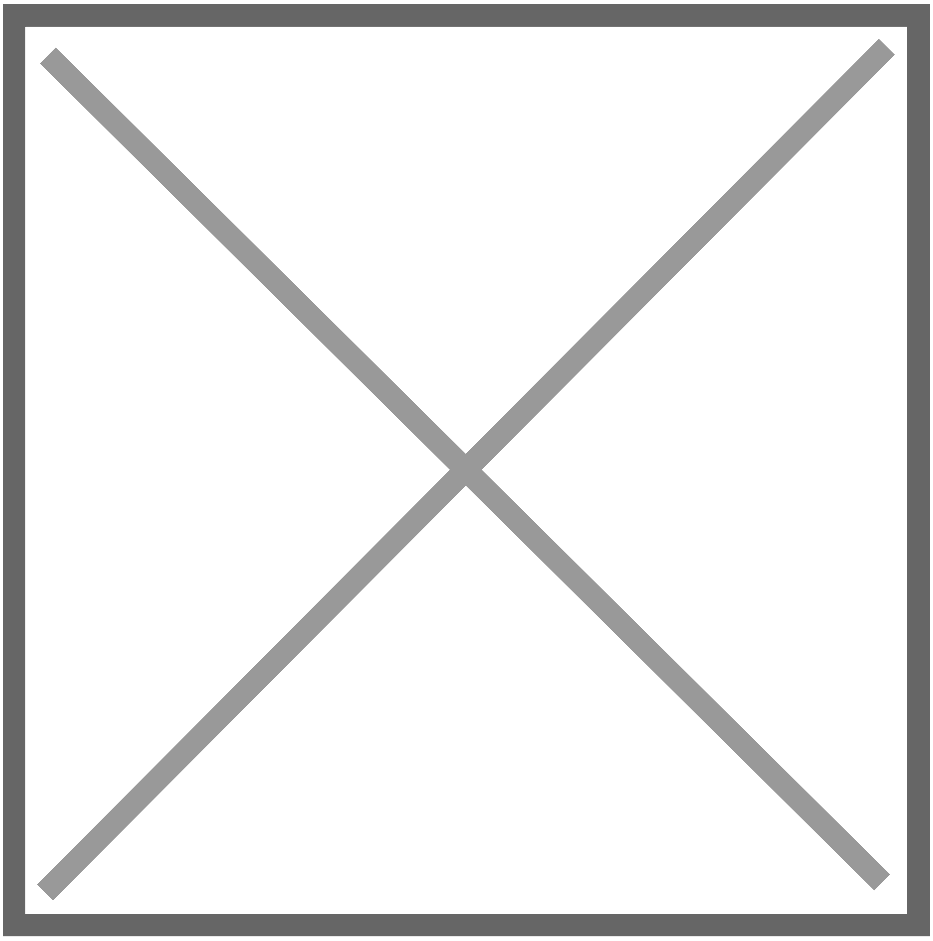
Selection Criteria

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.