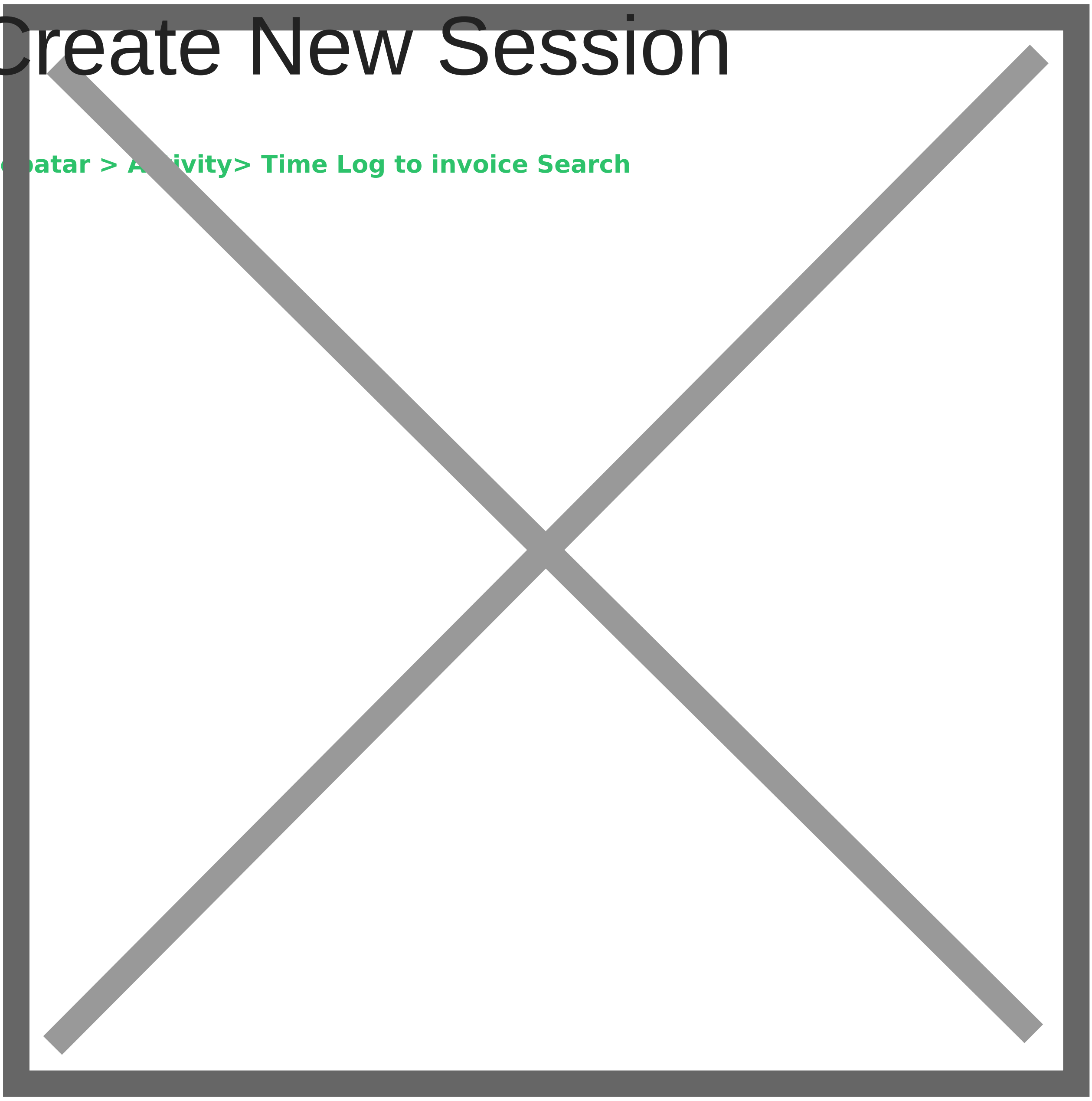
Create New Session

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.

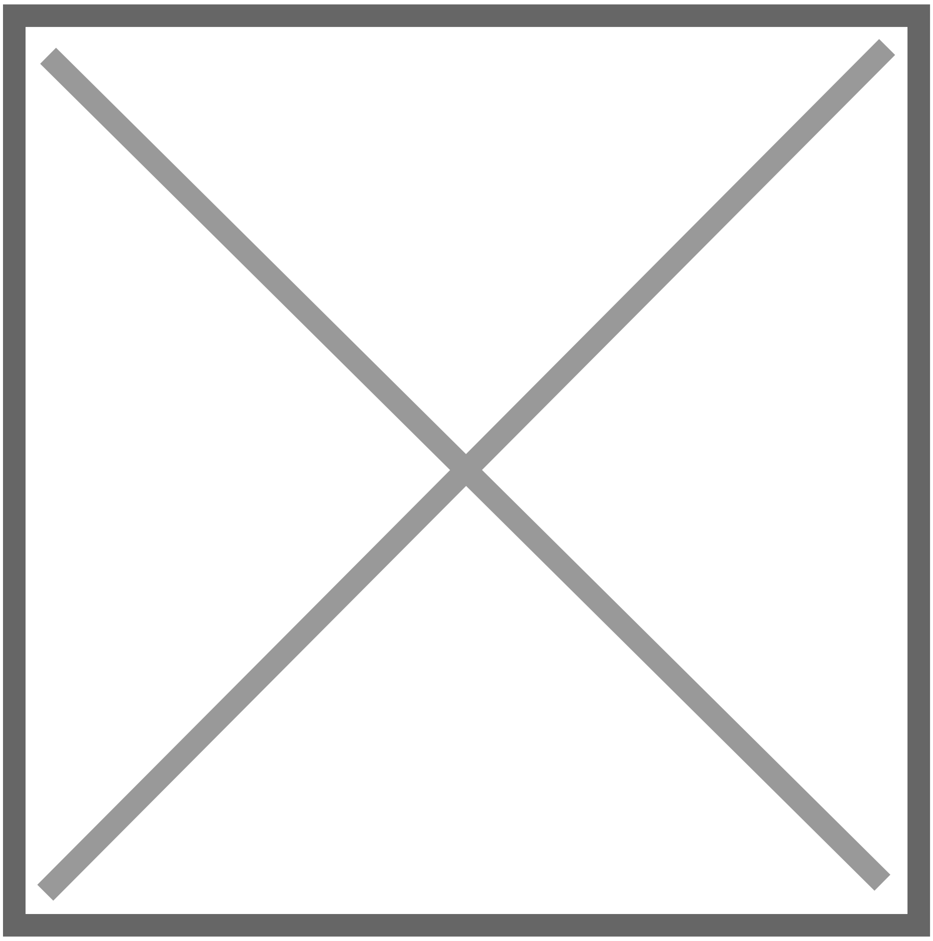
Selection Criteria

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.

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