![Synergy Business Solutions logo]
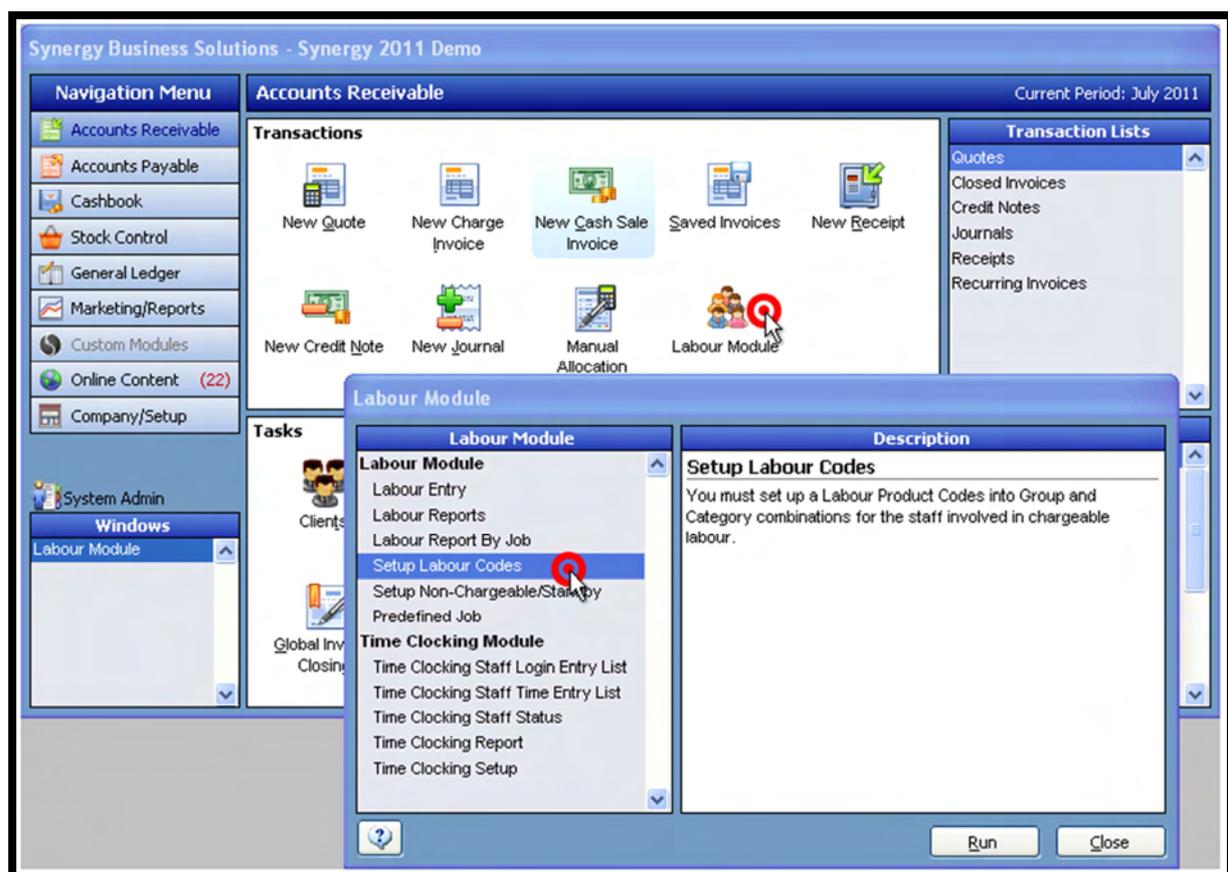
Synergy Time Clocking Module

Contents

Time Clocking Module – Before you start

Before you start using the Synergy Time Clocking Module, we suggest you complete these 'back office' steps to make the running of your programme more efficient.

Setup Labour Code

Accounts Receivable ›› Labour Module ›› Setup Labour Codes

You need to setup a Labour Code for every Staff member and assign them a default product code. If you have a barcode scanner, you can create and print off a barcode for each staff/product code, this is used when your Staff login to the Time Clocking Module at the beginning of their day. Simply scan the barcode rather than entering the Staff code to ensure accurate codes are being used.

- Select 'Setup Labour Codes'
- Select 'New'

- Select the Staff Code you are setting up.
  - o To set up a new Staff Code go to 'Company/Setup' – 'User/Staff Maintenance' – 'New' – Enter in the staff members Staff Code, First Name, Surname and a Password.
- Select the icon on the Group & Category line to put the staff code to a group.
  - o To add a category Click on an existing group (For the labour module a code to use could be LABOURS and description of Labour)
  - o Select 'Add Category' and enter a 'Category Code', 'Category Description' etc for the staff member (a code could be LAB (labour) and then Staff initials i.e. LAB-AS)
  - o To set up a Product Code, Select 'New Non-Stock Product' on the 'Labour-Code List Screen' and enter the details for the staff member as a non-stock product.
- Create and print a barcode if you wish to use a scanner in conjunction with the Labour Module.
- Save

Setup Non-Chargeable Jobs

Accounts Receivable ›› Labour Module ›› Setup Non-Chargeable/Standby

You need to setup as many non-chargeable jobs which you want to use in the Time Clocking Module. It is of benefit to setup the 'Allocated Time' for every non-chargeable job that is to be used.

The 'Productive' tick box is for the Time Clocking 'Daily Productivity Report'. Some non-chargeable jobs are productive, for example: 'Cleaning Workshop' and 'Training' etc, whereas an example of 'Sick Leave' is not productive.

If you have a Barcode Scanner, you can create and print off the barcode here for the Non-Chargeable Jobs. Staff can now scan a barcode when they are selecting a non-chargeable job for their time entries, instead of using the Job Search List.
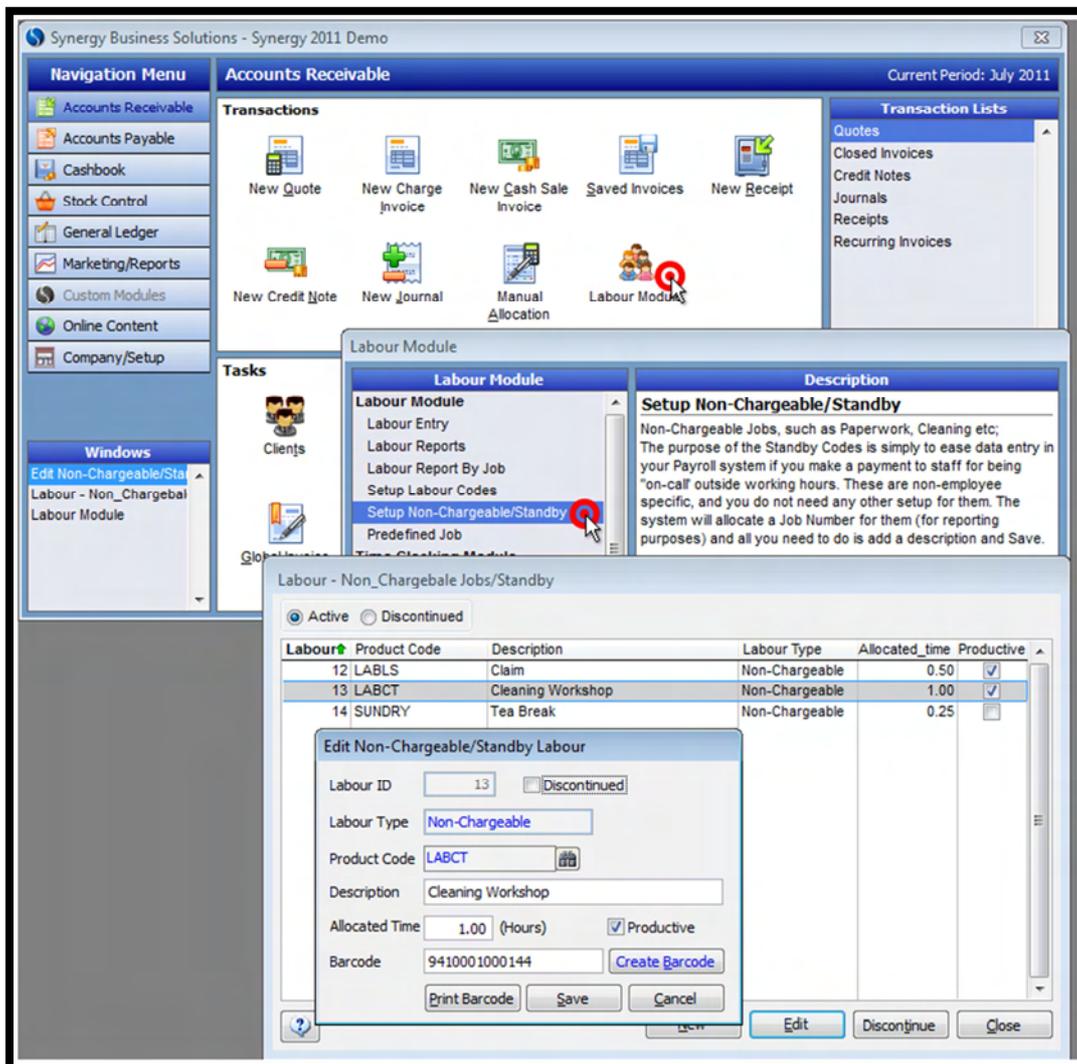
Setup Predefined Jobs

Accounts Receivable ›› Labour Module ›› Predefined Job

The setup of Predefined Jobs will be used in both the Synergy main application (AR Invoice) and the Time Clocking Module. It is of benefit to setup the 'Allocated Time' for every predefined job, the Allocated Time will be used in the Time Clocking Module as well as in the Labour Reports.
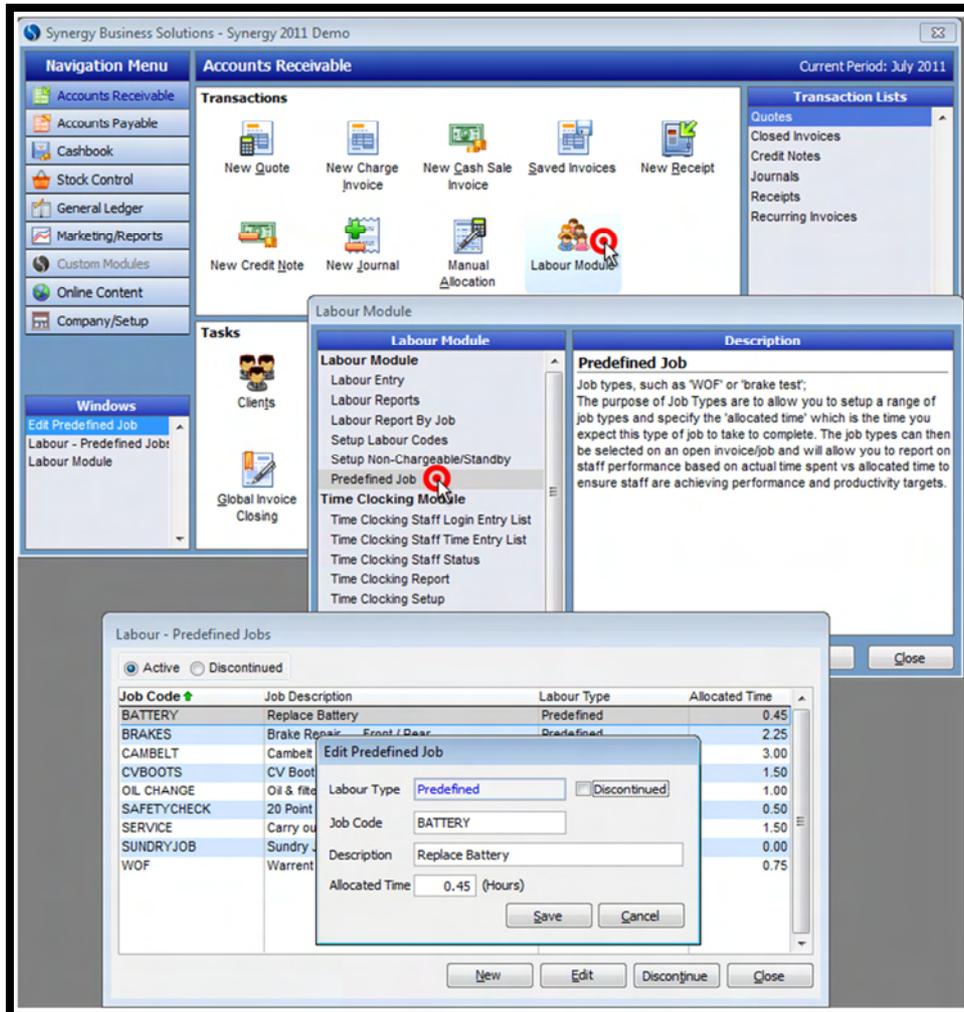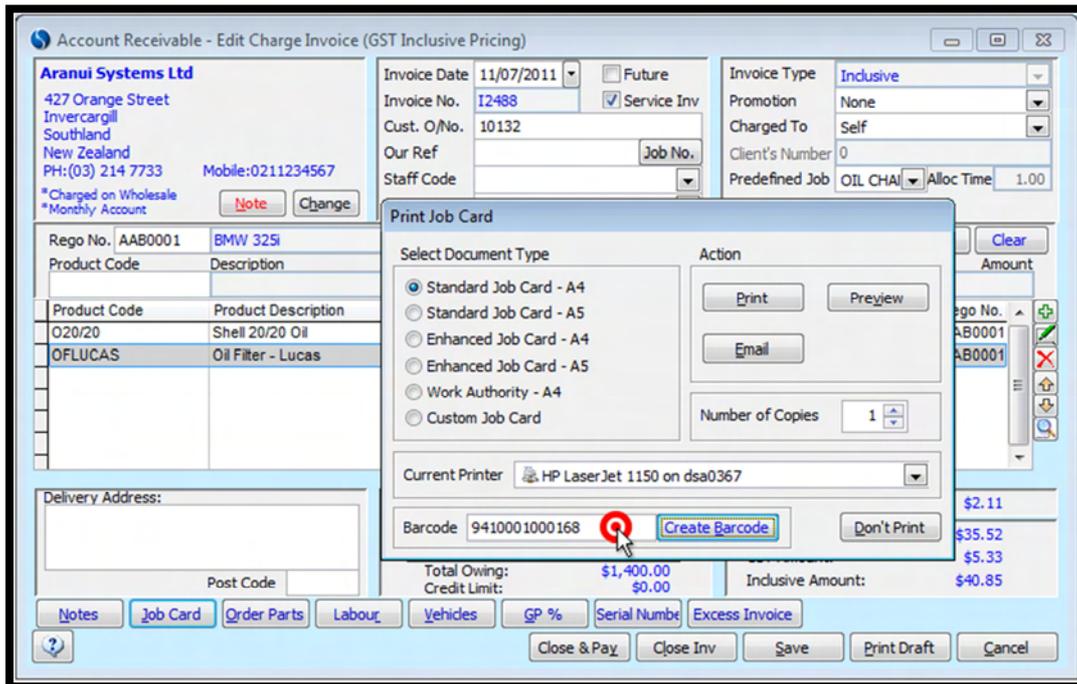

NOTE: The 'Allocated Time' of a predefined job can't be changed when you create the job as an AR Invoice.
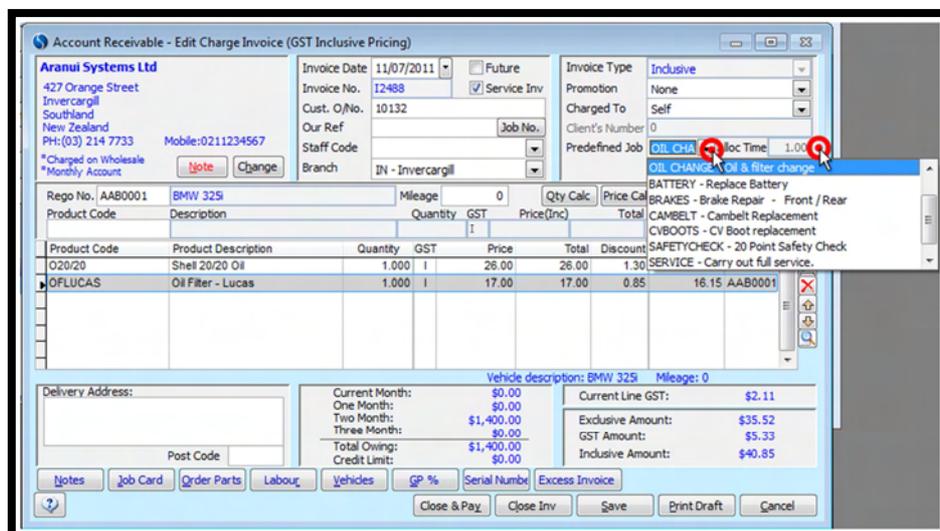
Setup a Barcode for the Job Card

Accounts Receivable ›› New Charge Invoice ›› Select Client ›› Job Card ›› Create Barcode

If you have a Barcode Scanner, you can create and print the barcode for a job when you print the Job Card. Staff can then scan this when they want to start a instead of using the Job Search List. Note there is a setup option to stop you needing to create the barcode here.
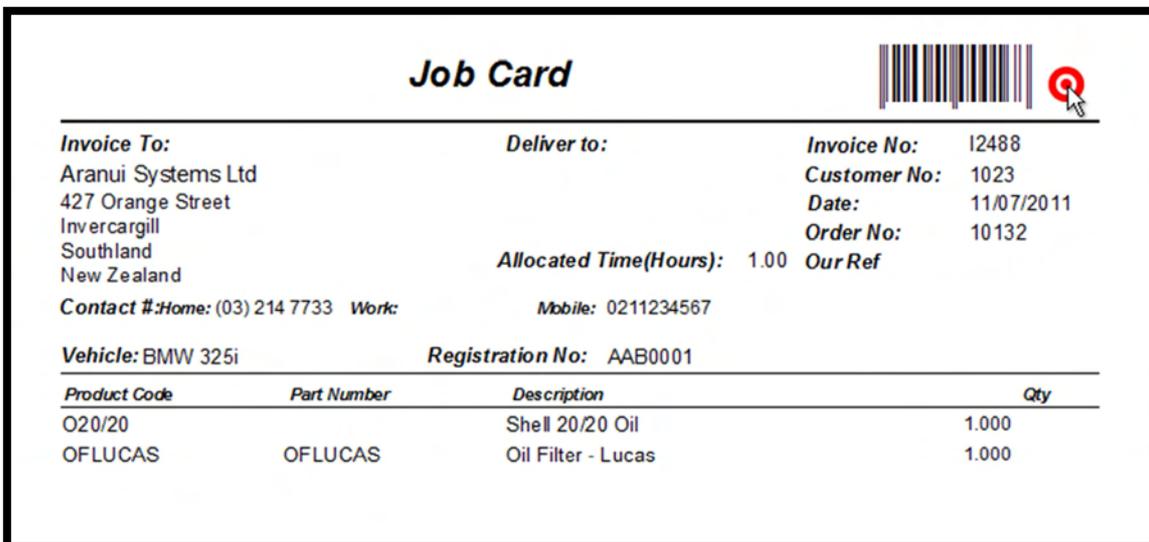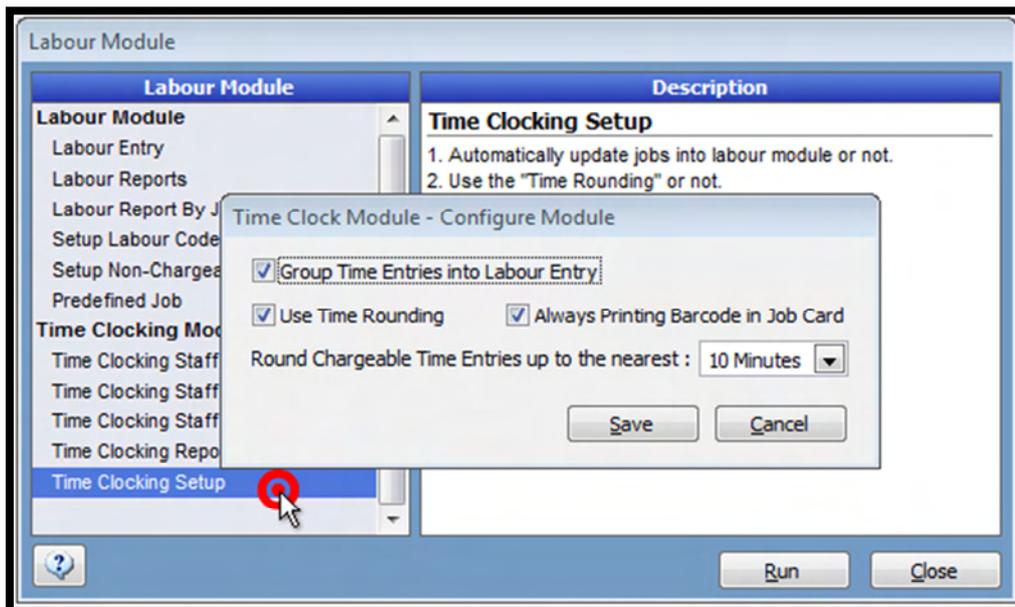

NOTE: If you don't see your barcode then please use this link to download the correct font on to each machine you need to print barcodes on.

> www.synergy.net.nz/downloads/files/installbarcodefont.exe

Time Clocking Setup

Account Receivable ›› Labour Module ›› Time Clocking Setup

The first two choices you will need to make to complete the setup of the Time Clocking Module are:

- 'Group Time Entries into Labour Entry'
    - o   This will group the time entries for the same job based on the date and the staff member when the job is stopped. You will see only one entry in the labour Module instead of multi-entries.

- 'Always Printing Barcode in Job Card'
    - o   This will automatically print the barcode on the job card without you having to click the barcode field.

- 'Use Time Rounding' & 'Round Chargeable Time Entries up to the nearest'
    - o   If this box is checked, then the 'Round Chargeable Time..…' control will be enabled. If this is enabled, you can choose from:

                    10 minutes,
                    15 minutes,
          or   30 minutes.

        This means when a time entry on a chargeable job is closed, the 'Hours Charged' will be automatically increased to the nearest time as set by the option you have selected.

        For example: Time Entered is - **1 Hour 32 Minutes**

        Rounding to the next 10 Minutes would increase that to 1 hour 40 Minutes

        Rounding to the next 15 Minutes would increase that to 1 Hour 45 Minutes

        Rounding to the next 30 Minutes would increase that to 2 Hours 0 Minutes

        A particularly useful tool if you charge in minimum blocks of time.

- o NOTE: If you are using both the 'Group Time Entries into Labour Entries' and the 'Use Time Rounding' options, the 'Time Rounding' will be applied to every time entry before the entries are grouped into the Labour Module.

Time Clocking Module Back Office Functions

Account Receivable ›› Labour Module ›› Time Clocking Staff Login Entry List
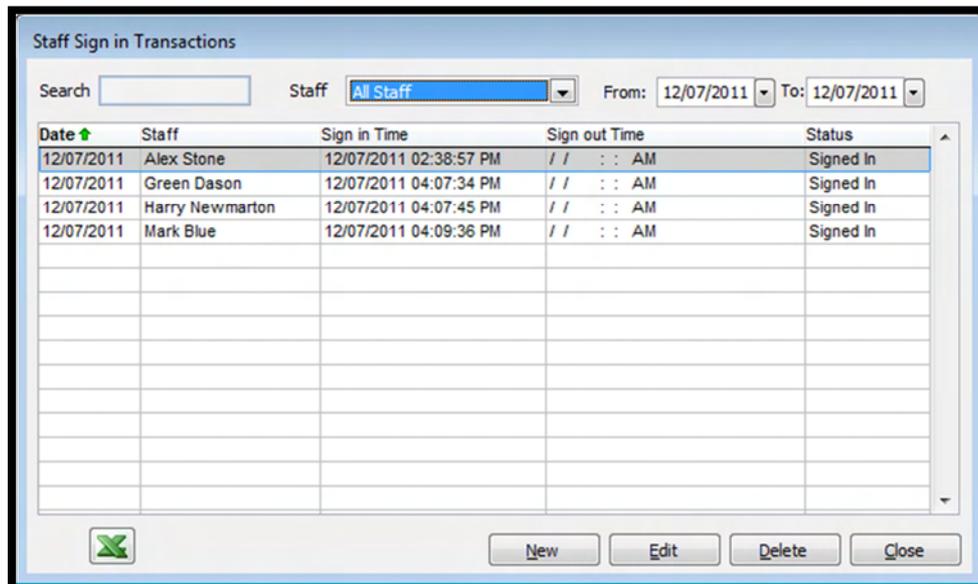
Time Clocking Staff Login Entry List
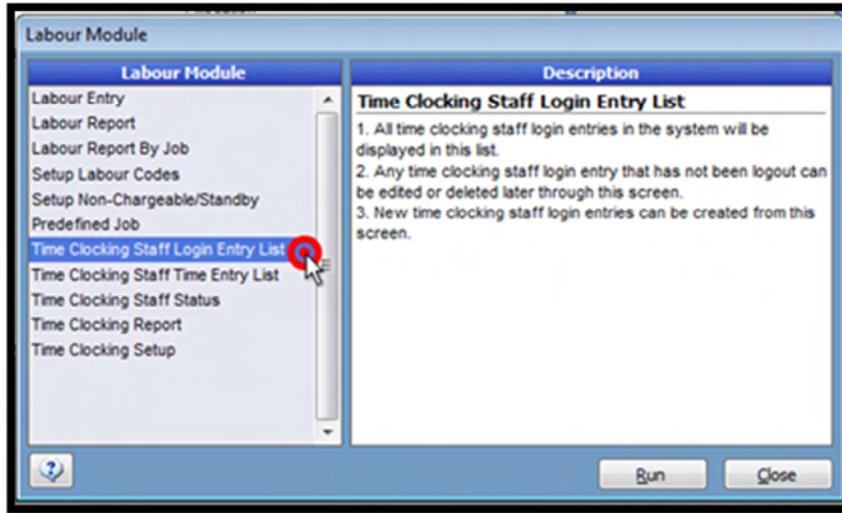
The purpose of this list is so the administrator can do some adjustments when a technician has made a mistake with the sign in and sign out process. For example: They forgot to sign out at the end of the day.

All time clocking staff login entries in the system will be displayed in the list. A time clocking staff login entry that has **not been logged out** can be edited or deleted later through this screen.
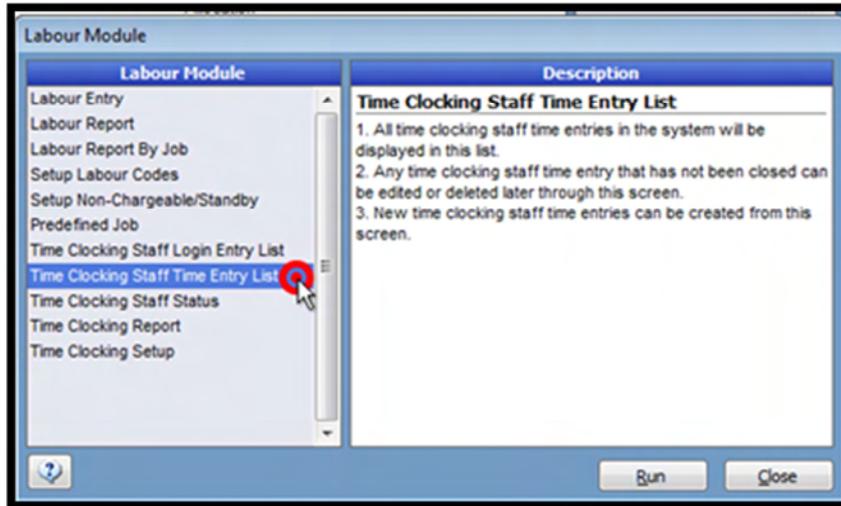
New time clocking staff login entries can also be created from this screen.

NOTE: If a staff member has an open job, this Staff entry can't be deleted or marked logged out from here.

Time Clocking Staff Entry List

Account Receivable ›› Labour Module ›› Time Clocking Staff Time Entry List

The list shows all time clocking staffs time entries so the administrator can see who is logged in and what jobs they are currently assigned to.   Any Job that is currently in progress (**not been closed**) you can edit or delete from here if needed.

Adjustment Button – this is available only for Closed Jobs in the time clocking module, you will only be able to adjust an entry that is a saved invoice and has not had the labour updated on it yet. There is authorization on this button to stop just anyone being able to adjust the labour. The adjustment is based on minutes and you can add or remove time here. Note: Cancel if you do not wish to add the time.

NOTE: If you are using the rounding feature then you will want to think about adjusting in multiples of your rounding. You will not be able to adjust an entry to zero here. Any entry that has been adjusted will show on the progress report for the day and a summary at the bottom.

Time Clocking Staff Status

Account Receivable ›› Labour Module ›› Time Clocking Staff Status
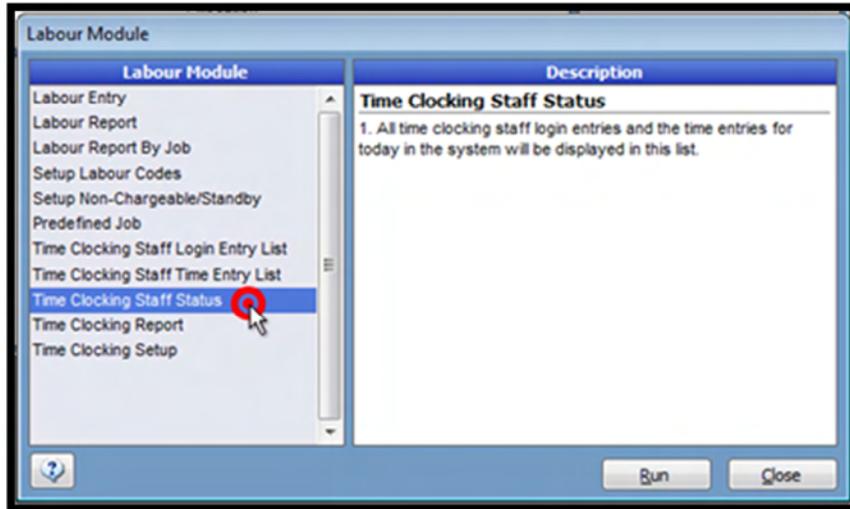
The Time Clocking Staff Status shows the current status of all time clocking Staff, are they Signed In, Signed Out, what job are they currently assigned to and what time did they started this job? In one quick overview, the administrator can know the exact working status of all the technicians. The information on this screen will refresh every 10 minutes or will refresh when opened.

Time Clocking Report

Account Receivable ›› Labour Module ›› Time Clocking Report
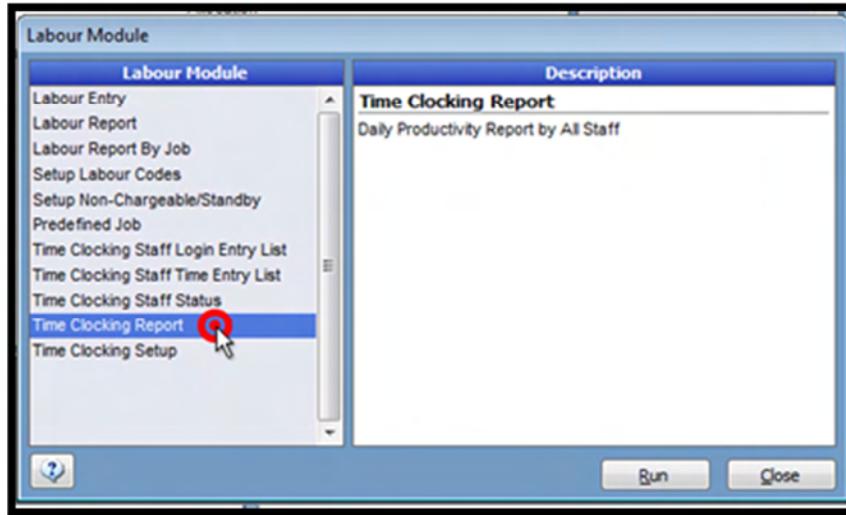
At the end of the day, you can print the 'Daily Productivity Report' for every technician that has signed in for that day.

If the technician forgot to sign out, their 'Daily Productivity Report' will still be printed but the finished time will show 'In Progress'.
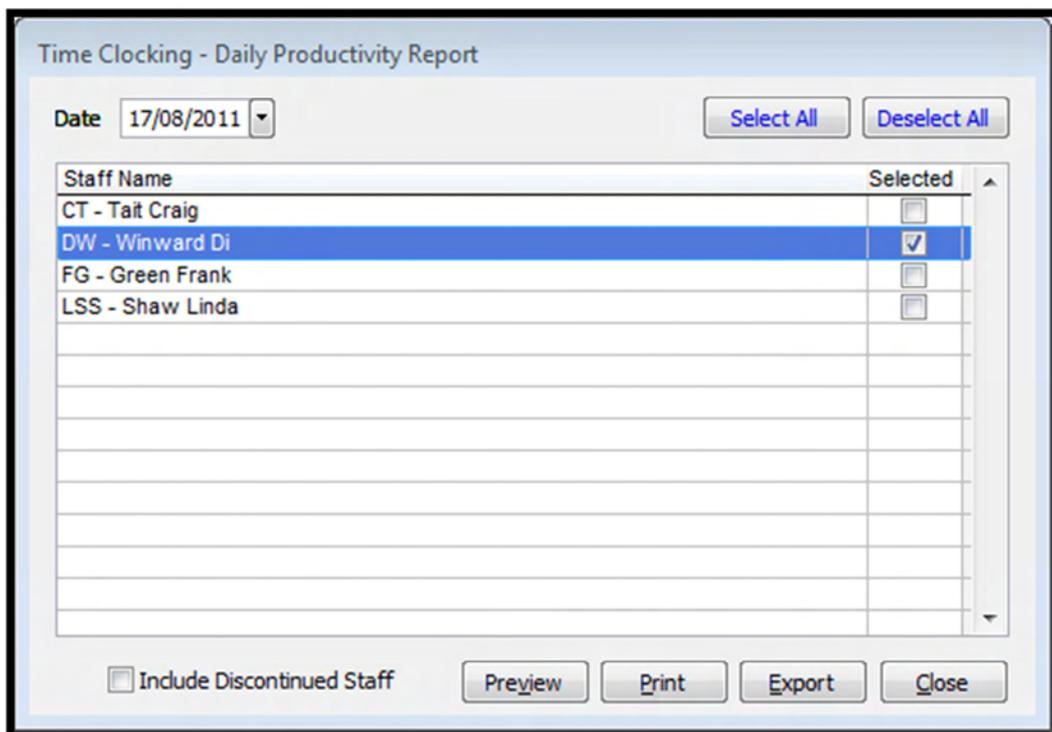
Synergy Business Solutions - Synergy 9 Demo
Daily Productivity Report - by Staff on 17/08/2011

DW - Di Winward

Description	Start Time	Finish Time	Duration (HH:MM)	Adjustment (HH:MM)
Shift Start	11:47 AM			
1024 - Winward D (Diane)	11:47 AM	11:48 AM	00:00	00:20
Shift End		11:48 AM		
Shift Start	11:53 AM			
1015 - Morris J S (Jo)	11:53 AM	12:01 PM	00:08	
3265 - Winterbottom D J (David) - BAH326	12:01 PM	12:07 PM	00:06	00:30
Shift End		12:07 PM		

Note: Duration is rounded to nearest minute, based on 'seconds' not displayed in Start Time and Finish Time.

Login Duration	00:14
Productive Time	00:14
Chargeable Jobs	00:14
Productive NC	00:00
Unproductive Time	00:00
Lost Time	00:00
Unproductive NC	00:00
Adjustment Time	00:50

Page 1   Report at 18/08/2011 02:18 PM

Time Clocking Module Work Station Functions

A technician can use the Time Clocking Module Work Station version to sign in/sign out for the day. They can Start and Stop a job either a chargeable or a non-chargeable job.

Signing in to the Time Clocking Module

A staff member can use their 'Staff Code', if you have a barcode scanner they can scan their 'staff barcode', or you can click on Staff List to select the code to sign into the Time Clocking Module.

The names of the technicians with **BOLD** green font have already been signed in.

Starting and Stopping a Job

To Start a job is as simple as clicking the Start Job button and scanning the barcode from the Job Card. If the job has no barcode then you can select if from the list. Both Chargeable and Non-Chargeable jobs appear in the list for selection.

To Stop a job is as simple as clicking on the Stop Job Button. This button is only available when a job is started. Now you are ready to start the next job.

The screen that Starts and Stops jobs has lots of details on it. These details have been described below:


1) Job Type
   Either a "Job"(from AR saved invoice) or a "Non-chargeable Job"(Read-only)
2) Start Time
   The start time is when the job has been started (Read-only). The current time will be assigned to this control when the "Start Job" button is clicked.
3) Allocated Time.
   If an allocated time has already been assigned to a job (From AR saved invoice) or a "Non-chargeable Job", this value will show here (Read-only).
4) Client Name
   This control will show the client name, if it was a job from an AR saved invoice. Otherwise it will just show "Internal Job" or a "Non-chargeable Job" (Read-only).
5) Job Details
   If this is a job from an AR saved invoice, then the text line details and vehicle information (registration number and vehicle description) will be shown here. If this is a "Non-chargeable Job", the non-chargeable job description will be shown here (Read-only).
6) Duration
   When the "Start Job" button is clicked, this control will start to time (Read-only).
7) Notes
   When the staff member starts / stops a job, he can write a brief note for that particular job, this description will then be transferred to the "Notes" field of the labour entry when this job is stopped. The Notes will only be transferred if you are using Synergy 2011.
8) Job Number
   The staff member can either use the "Job Number" or barcode for "Job" / "Non-chargeable Job" to

select a "Job" / "Non-chargeable Job". The job list form can also be used for this process as well (F2 search function is also available for this control).
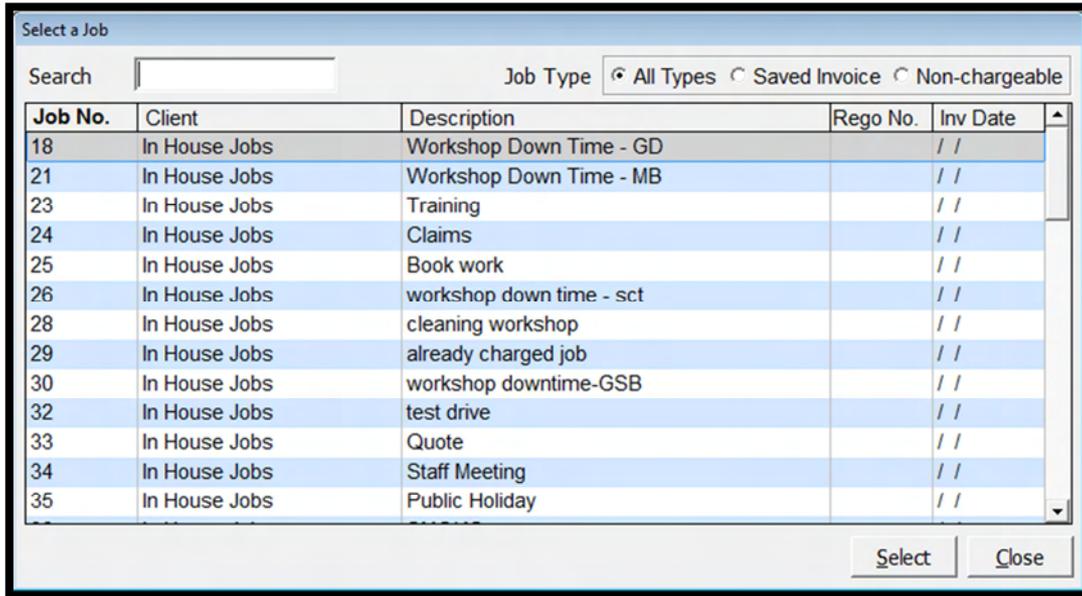
9) Product code.
   If a job from an AR saved invoice has been selected, then the default product code for this staff (In labour code setup form) will be assigned to this control. If a non-chargeable Job has been selected, then the product code for this non-chargeable Job (In non-chargeable job setup form) will be assigned to this control. The product code list form can also be used for this process as well (F2 search function is also available for this control).
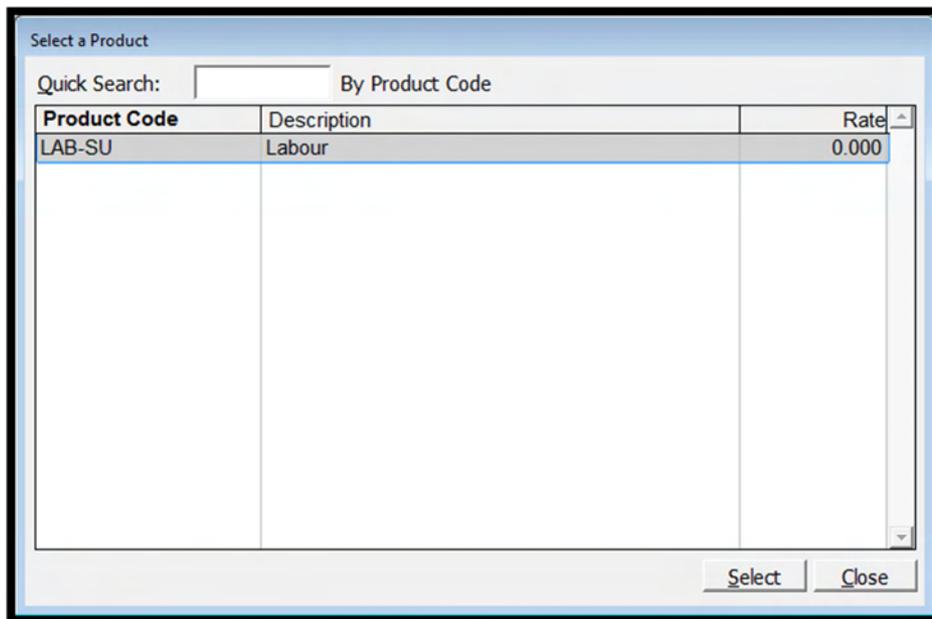
10) "Start Job" button.
    Once this button has been clicked, the duration will start to time. The staff member needs to select a job and the relative product code, then they can Click "Save & Close" button to exit this form. All the valid information for the current screen will be saved automatically when the "Save & Close" button is clicked.

11) "Stop Job" button.
    Once this button has been clicked, the duration will stop. The current job or non-chargeable job will update the labour entry directly in the background.

12) "Progress Report" button.
    Once this button has been clicked, the progress report will be visible on screen. This will be the progress report for today for the staff member who is signed in.
13) "Save & Close" button.
    Once this button has been clicked, the current screen will be closed. All the valid information for the current screen will be saved automatically when this button is clicked.
14) "Sign out" button.
    Once this button has been clicked, the staff member will sign out from the "Time Clocking" module and the current screen will be closed. If there is still an opened job for this staff member, then this job will be stopped automatically.

    If there is no action within the "Time Entry" form in 5 minutes, the form will be closed automatically and will return back to the "Staff Login" form. If the form returns, all the valid information for the screen will be saved automatically.

Additional Information

Security Setup

Under User/Staff Maintenance you can now authorise them to the labour module and time clocking features inside the Transaction/Task. Note: This feature is only available when the user is not an Administrator.