

EDITING AN EXISTING TIMESHEET

1. Open the timesheet.
2. Make the required changes directly into the **Timesheet** window.

Click the **X** Button to close the timesheet and select **Yes** to Save the changes.

A timesheet cannot be edited in a closed lock off period or closed accounting period.

Any items in **red** cannot be changed as they are partially or fully billed.

Fields available to edit



Charge rate, units, comment.

Changing the client/job

As you cannot edit the Client/Job or task code in a saved timesheet you can either:

- Move the entry via **Timesheet ▶ WIP Transfer**.
- Or in that timesheet (if still within a current accounting period or timesheet lock date is not enabled for that date), enter a negative entry line for the incorrect client/job or task code and a positive entry line for the client/job to which you wish to move it.

ENTERING A TIMESHEET FOR ANOTHER EMPLOYEE

1. Select **Employee** under the drop down menu under the Contacts Icon.
2. Search for the relevant Employee.
3. Highlight the relevant employee and select **Open Timesheet** from the Task Bar,
4. The timesheet will open at today's date. To change the date, click on the up or down arrows  next to the date or click on the Calendar .
5. Enter the timesheet information and click **Save** to save the timesheet.



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ACCOUNTANTS OFFICE TIMESHEETS

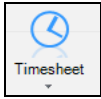
Quick Reference Guide





ENTERING TIME AND OVERHEADS

Creating a New Timesheet

Click on **Timesheet** icon on the Tool bar.



The timesheet will open at today's date. To change the date, click on the up or down arrows  next to the date or click on the Calendar .

Note: The up arrow takes you forward and the down arrow takes you back.

Entering Time

Time and overhead details are entered directly into the **Timesheet** window.

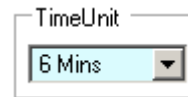
For each time entry:

1. Select the required **Client/Job**
2. Select a **Job Year** (Job Description) if applicable.
3. Select the appropriate **Task** code
4. The system will default to your standard charge rate. You can select another charge rate if required.
5. Enter the time units in the Units column.
6. The system will default the total charge value automatically and cannot be edited.
7. Enter a comment if required.
8. Press **[Enter]** to complete the time entry.

Tip: Use **[Tab]** or **[Enter]** to move through the time entry fields.

Notes:

- The system has an automatic repeat key enabled. This will duplicate the timesheet line just entered with all details except the time units. You can then select a different client/job and task code if required.
- The system defaults to 6 min units but can be changed if you prefer to work in hrs or individual minutes.
- In the bottom left hand corner there is an option for *Search any part of name/code* which is ticked by default. This option allows you to search for any part of the name or client code.



For example, if you type **cat** in the client/job area it will pull up a list of clients that have **cat** anywhere within the client name or code.

- Entries will appear in the Client/Job as WIP and be available for billing once you have selected the save option.

Entering time using the Background Mode

By using Background Mode you have the choice of entering a Start time and End Time, where the system will then populate the number of units and charge value automatically.

SAVING A TIMESHEET

To **Save** your timesheet entries at any time you can select the Save option on the task bar, or when you close the timesheet the system will ask if you want to **Save**. If you select No the system will not save any new entries since your last save.

OPENING AN EXISTING TIMESHEET

To open a previous day's timesheet click on the **Timesheet** Icon and use the down arrow or calendar to open up the desired date.