TimeDesk

What is TimeDesk?

TimeDesk is a software system designed for the service industry. It handles labor based billing (time and billing) and service ticket tracking as well as adding some help desk features. Geared toward the service industry, it provides customer tracking, RMA (Return Merchandise Authorization) tracking, and Pre-paid retainer billing.

TimeDesk has the capability of linking with several different accounting systems for the purpose of creating sales orders for billing customers for the service that was performed.

Software Technical Support For TimeDesk

Software support for TimeDesk can be found by contacting your local software reseller or you can contact US Software, Inc.

US Software Inc.
Website: http://www.unitydc.com
E-Mail: support@unitydc.com
Fax: 815.239.1926
Telephone: 815.293.1868

Installing TimeDesk on the Server

For CD-ROM installation, insert the Unity CD in your CD-ROM drive. The CD should automatically start in most systems. If it doesn't start automatically follow these steps:

1) Go to "Start"
2) Select "Run"
3) Type D:\SETUP.EXE and press the "OK" button.
   (Substitute the appropriate drive letter where you see "D")

Follow on screen instructions. The installation to the server can be done from any workstation. It is unnecessary to perform a workstation installation then on this PC.

Installing TimeDesk Client on the Workstation

For the workstation installation, you will not need the Unity CD in your CD-ROM drive. The installation program is run from the network after the software is installed to the server. You must do the server installation first. Follow these steps to do the client installation:

1) Go to “Start”
2) Select “Run”
3) Type F:\UNITY\CLIENT\CLIENT.EXE and press the “OK” button.
   (Substitute the appropriate drive letter and path where you see “F:\UNITY\”)

Follow the on screen instructions.

Set Up for TimeDesk

Once you have installed TimeDesk and run it for the first time, the setup screen will come up automatically. This screen can be accessed later from the File menu by clicking on the Setup option.

Setup

Searches

One of the features built into the TimeDesk system is our incremental search utility. The incremental search actually looks for the item you are searching for as you type.

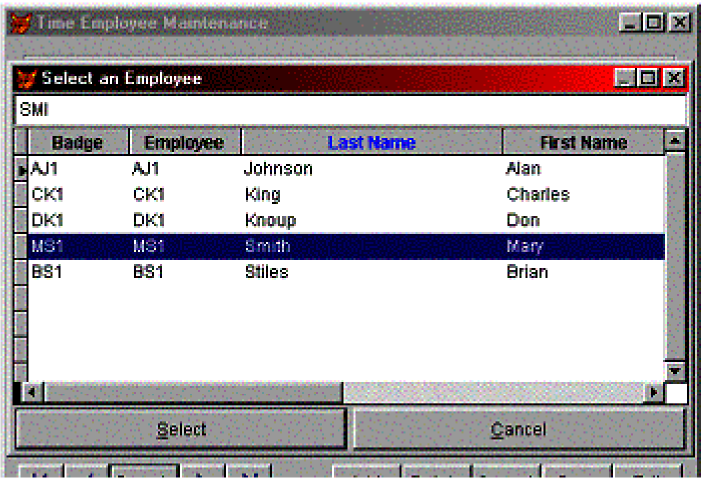
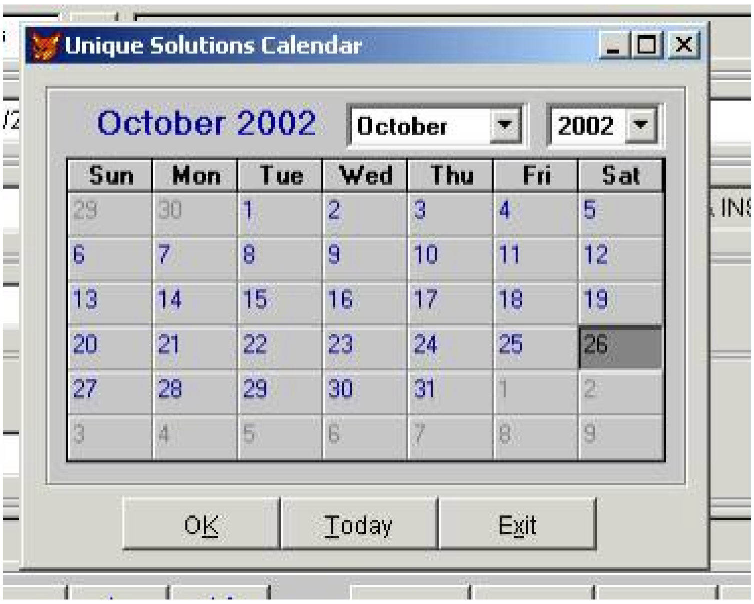


Figure 1.1 Search Utility

You can change the search

Pop-Up Calendar



There is a handy pop-up calendar that can be accessed by Double-Clicking on any date field throughout the TimeDesk system. The pop-up calendar gives the user a month by month view. You can change the month that you are viewing by clicking on the month drop down at the top right of the screen and then selecting a month. You can change the year by clicking on the year drop down at the top right of the screen and then selecting a year.

Clicking on any date on the calendar will select that date. To quickly move to the current day’s date, click the “Today” button at the bottom of the screen. To exit without selecting a date, click the “Exit” button at the bottom of the screen. To select the date chosen click the OK button and you will be returned to the original date field.

Schedule/Calendar

TimeDesk offers a schedule for scheduling appointments, meetings, etc. for each employee. To access the calendar you must click on the calendar icon on the toolbar. The calendar offers both a monthly view and a day view. The calendar shows all the events for the selected employee(s). You can switch employees by selecting an employee from the selection list at the right side. Multiple employees can be selected by holding down the CTRL key on the keyboard while clicking on the names of the employees you wish to select.

The calendar can be printed for the current month by clicking on the printer button in the lower right corner of the screen.

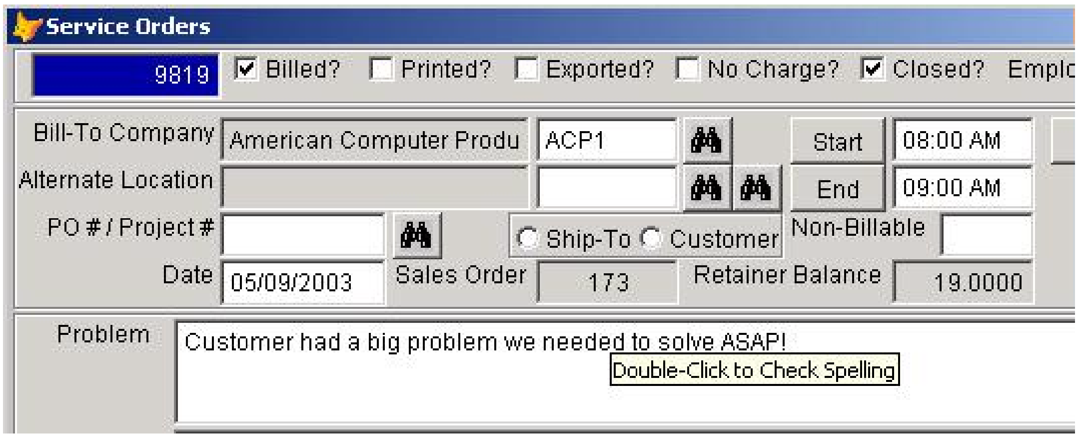
To add an appointment, first select the date you wish to place the appointment on. Next right-click on that date with the mouse. Select Add Appointment on the menu that appears on your screen. From the Appointment screen you can select who you are making the appointment for, a start time, a stop time, and enter a description of the event. The "Copy" button on this screen allows you to copy an appointment.

See Also

User Maintenance

Spell Check Feature

As a productivity enhancement users with Microsoft Office installed on their PC can utilize the powerful spell checker in MS Office. The spell check feature is active in all large text fields throughout the software. Thes fields include the problem and resolution fields on the service orders screen as well as other large text fields on other screens like the RMA entry and Projects screens. The spell check feature can be used on the Service Orders Screen's problem and resolution fields as well as on the RMA entry screen's Notes field. To utilize the spell check feature simply double click on the field.



Selecting a Company

When more than one company is setup, you have the option of selecting a company when you first start TimeDesk. Once you have started TimeDesk you may change companies by choosing the “Select a Company” option from the File menu.

Set Up for TimeDesk

Once you have installed TimeDesk and run it for the first time, the setup screen will come up automatically. This screen can be accessed later from the File menu by clicking on the Setup option.

Setup

User Login - Security

TimeDesk includes user level security which requires users to log in with a distinct user name and password. The login window appears when the program is started and can be accessed again by choosing "Login" from the File menu. User login ID always defaults to the current windows login name. Passwords are case sensitive, so take care when entering the password in the login screen.

To add new users, you will find the “User Maintenance” option under the File menu. User names are entered in all upper case letters. The password, however, is case sensitive for added security. So, if the password is entered in user maintenance in all lower case, all upper case, or mixed case, than it must be entered that way when logging into the system.

See Also

User Maintenance - Security
Clear Active Users
Display Active Users

User Maintenance - Security

TimeDesk includes user level security combined with a user table that allows you to assign employees to service orders. To turn on the user level security simply add users through user maintenance. You will find the “User Maintenance” option under the File menu. User names are entered in all upper case letters. The password, however, is case sensitive for added security. So, if the password is entered in here in all lower case, all upper case, or mixed case, than it must be entered that way when logging into the system.

By default, new users added to TimeDesk are given an "Active" status. You may set the status to "Inactive" at any time. Inactive users will not show on employee selection screens throughout the system. Additionally, any inactive user will no longer be able to log into the TimeDesk software.

In order to be able to use the e-mail features of TimeDesk you must specify an email address and SMTP Server for each employee. The e-mail address specified here will be the “from” address used whenever this user sends an e-mail message from TimeDesk. E-Mail will be routed through the specified SMTP Mail Server. Be sure to specify the name of your mail server in this field. (i.e. mail.mymailserver.com) Check with your network or e-mail administrator if you are unsure of your mail server's name.

There are 3 levels of access. The first is Unlimited which gives the user the ability to access, view or change information. The next is Read Only, this option gives the user the ability to access or view information only. Read Only access does not allow changes, additions, or deletions. Finally there is No Access which limits the users access to the given function. You can set up access levels for the following features of TimeDesk:

User Maintenance
Company Setup
Access FoxPro
Modify Reports –Used to protect the Modify Report and the Modify Label options.
Transactions - Includes items in the Transactions menu.
Maintenance - Includes items in the Maintenance menu.
Reports – Includes all reports in the Reports menu.

You can also optionally open the “Open Service Tickets” window each time the user logs in and starts the software. This setting is configured per user. When the box is checked, the user will see any open service tickets they have in the system at the time they first start the software and log in.

If you decide later you wish to disable the user level security, simply delete all of the users through the user maintenance screen. Once all the users are deleted, you will no longer need a user ID or password to log in. Please note that without security in place users have unlimited access to all functions within the TimeDesk system, also you will be unable to assign service orders to a specific employee.

See Also

Clear Active Users
Display Active Users

Packing And Reindexing

"Packing and Reindexing" is done by selecting the Pack and Reindex option from the File/System Tools menu. Packing and Reindexing removes deleted records and rebuilds index files for the currently selected Unity company's data tables. Please see the data dictionary in Appendix A of the User's Manual for more information regarding data tables.

This is a single user function. You MUST be the only user in Unity when using this utility.

Note to developers: Unity will delete the compact index file (.CDX) for each table and then re-create that index file during this Pack and Reindex process.

See Also

Active Users

Active Users

By selecting Active Users from the File/Users menu you can see which users are currently logged in and the time that they logged in. This report can also be printed by clicking on the printer icon.

See Also

Security - User Maintenance
Clear Active Users

Clear Active Users

If a user abnormally exits the system it may appear on the Active Users display that they are still logged in or that they are logged in more than once. To clear all users from the active list choose Clear Active Users from the File/Users menu. There should only be one person in the system when using this option.

See Also

Security - User Maintenance
Active Users

E-Mail Signature

Modify Report

This option which is available under the File/System Tools menu can be used to modify the reports in TimeDesk. Please note that knowledge of the Visual FoxProÔ report writer is required for this function. Please refer to the Microsoft Visual FoxPro documentation for more details.

See Also

Modify Label

Modify Label

This option which is available under the File/System Tools menu can be used to modify the labels in TimeDesk. Please note that knowledge of the Visual FoxPro" report writer is required for this function. Please refer to the Microsoft Visual FoxPro documentation for more details.

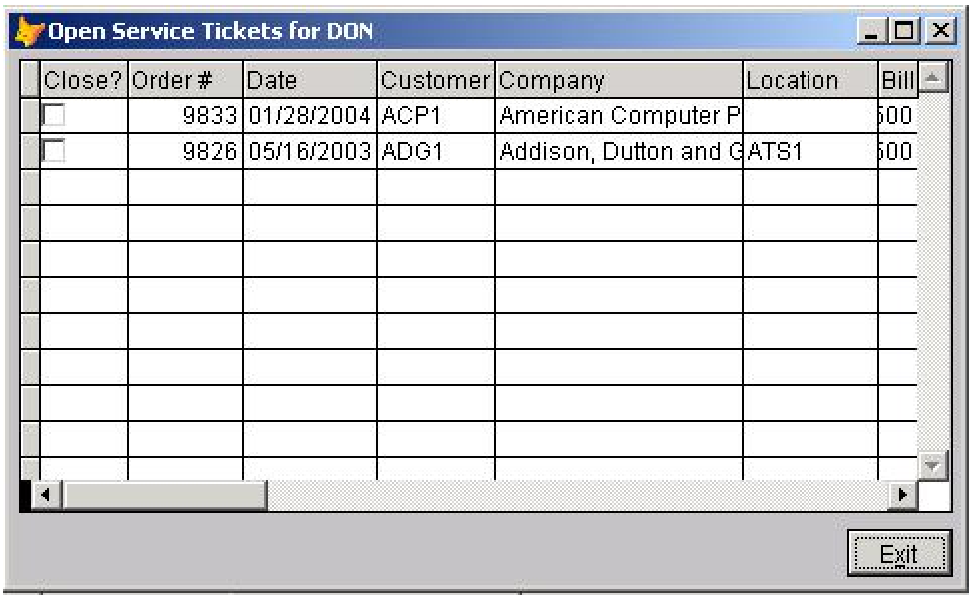
See Also

Modify Report

Service Orders

Open Service Tickets

The Open Service Ticket screen acts as a reminder at login that checks to see if the current user has any open tickets. If they have open tickets an Open Service Ticket Screen appears with a grid listing all open tickets. Tickets can be closed right from this screen by checking a box or the user can double click on any of the service tickets listed and go directly to the service order screen.



The Open Service Tickets screen can also be accessed at any time while using TimeDesk from the Transactions menu.

Service Orders

Projects

TimeDesk's Projects screen enables the user with a method of tracking projects. A project number can be specified on each service ticket. The PO#/Project # field on the service ticket entry allows for specifying a project number for each service ticket or the search button next to the project/PO # field on the service order can be used to find a project for the selected customer. The project screen has fields for notes and pertinent dates.

Duplicate projects are not allowed. Each project number must be a unique number for the selected customer.

Service Orders
Customer Maintenance

Entering RMA's

RMA Entry screen is accessed from the Transactions menu. The RMA or Return Merchandise Authorization screen is divided into two sections; Header and Detail. The Header section of the data entry screen provides fields for tracking pertinent dates and any notes that might be associated with this RMA. The Detail section allows you to add item(s) to specify exactly what is being returned.

Once the RMA has been completed, the Closed check box should be checked to signify that this RMA is done.

Build Accounting System Sales Orders

Customer Maintenance

Customer Type Maintenance

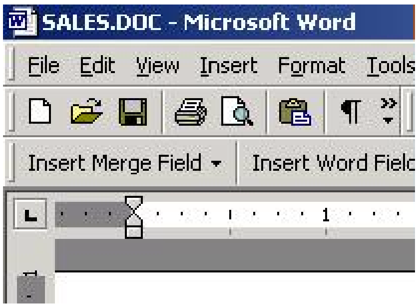
Mail Merge Templates

Mail Merge Templates can be created and edited from the Maintain menu by choosing the Mail Merge Templates option. Mail Merge requires the installation of Microsoft OfficeÔ. The Mail Merge Templates screens consists of a grid which lists all of the existing templates and a set of fields which allows the creation of new templates.

To create a new template, first type a valid document name in the template field. Word Document templates must end with .DOC. Next, you will want to type in a description the description field, which describes the template being created. After the template name and description have been entered, click the New button.

Microsoft Word will start automatically creating a new word template with the name you gave in the Template field.

Developer Note: This template file will be stored in a folder called TEMPLATE under the directory where the Unity Data Files are stored.



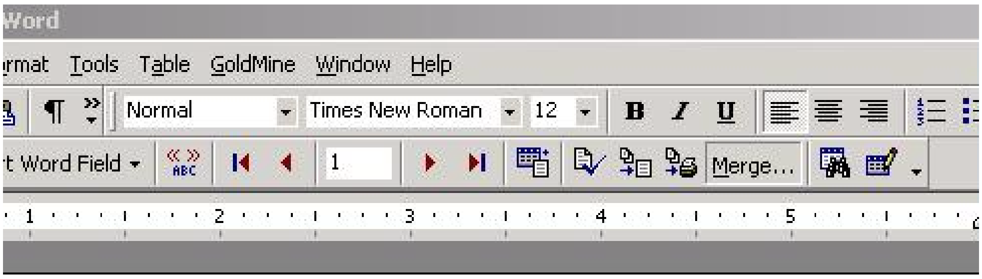
To add customer file fields to your word document, click on the Insert Merge Field button from the toolbar in Microsoft Word. Once you click the button, Microsoft Word gives you a list of fields to select from. You can then click on the field you wish to insert into your document.

For more information about creating Word documents, please refer to your Microsoft Office documentation.

With the template file completed you can save the file in Word and then you can close the document and exit the Microsoft Word application.

The template file can then be used from the customer maintenance screen to merge the template with a single customer.

To edit an existing mail merge template, you can either select a template by double clicking on the appropriate template in the grid. Or you can highlight the template and then click the Select button at the bottom of the screen.



If you desire to merge a template with more than one customer you can do so by opening the template file by using the instructions above. Next, you will need to click the Merge button on the Microsoft Word toolbar.

After, clicking the Merge button, the Merge dialog screen will appear. From this screen you can click Merge to create a new document merged with all of your customers, or the Query Options button allows you to filter your data however you wish.

Refer to your Microsoft Office documentation on how to filter and sort records using the Query Options… button in the merge dialog screen.

Customer Service Summary Report

The Customer Service Summary Report, found on the Reports

Customer Service Detail Report

The Customer Service Detail Report, found on the Reports

Service Order Status Report

The Service Order Status Report, found on the Reports

Total Hours Billed by Employee Report

The Total Hours Billed by Employee Report, found on the Report menu, prints a report of hour an employees has billed with all of the information which is recorded in the Service Order screen. The Total Hours Billed by Employee Report can be filtered by date range and employee ID.

Monthly Hours Billed Chart

The Monthly Hours Billed Chart, found on the Reports

Expense Report

The Expense Report, found on the Reports

Retainer History Report

The Retainer History Report, found on the Reports

Open Retainer Balance Report

The Open Retainer Balance Report, found on the Reports

RMA Summary Report

The RMA Report, found on the Reports