TimeDesk

Version 2.0

User's Manual

Copyright Information

US Software

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Chapter 1 - Getting Started

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 TimeDesk CD in your CD-ROM drive. The CD should automatically start in most systems. If it doesn't start automatically follow these steps:

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

Follow the 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 TimeDesk 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:

Go to "Start"
Select "Run"
Type F:\TIMEDESK\CLIENT\SETUP.EXE and press the "OK" button.
(Substitute the appropriate drive letter and path where you see "F:\TIMEDESK\")

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 is the area where you define your company(s) for Unity. Each company can be linked to a specific accounting system company. There should be a one-to-one relationship between your TimeDesk company(s) and your accounting system company. For each company in your accounting system there should be only one company setup in TimeDesk.

The TimeDesk data path is the location where you will store this company's data. Each company in TimeDesk will have a separate data directory. For example your entry in the TimeDesk data path field may look like this:

C:\TIMEDESK\MIKEBIKE\

WARNING: Do not use the \SYSDATA\ directory under your main TimeDesk directory to store company data. This directory is reserved for system data only.

Linking To An Accounting System

If linking to an accounting system it is necessary to select the type of accounting system you are linking to in the "Accounting System" drop down field. When not linking to an accounting system, please select “None” in this drop down. Enter the path where your accounting system directory is located in the "Accounting System Path" field. Once a proper path is entered you will then be able to use the Search button next to the Accounting Company field to choose the correct company to link to.

Next you will want to fill in the three item number fields for Labor, Travel, and Retainer. All billing in the accounting system for these three functions will use the item numbers referenced here. It is important that you verify that these items exist in your accounting system software. If not you must add these items before using TimeDesk linked to your accounting system. The Labor item represents normal billable hours which are billed to any customer through the service ticket entry screen. The Travel item represents any travel hours which are billed to any customer through the service ticket entry screen. Finally, the Retainer item is the item number the system will use when creating sales orders to bill for any pre-paid retainers that are created from the customer maintenance screen.

Adding Users

Once you have your company setup you will want to move on to adding employees into the Time Desk User Maintenance screen.

Deleting a Company

The delete button on the Setup screen allows for deleting a company. As a safety measure, deletion of the currently selected company is not allowed. If you wish to delete a company you must first select another company by using the Select Company function from the File menu. After choosing to delete a company, you can optionally choose to destroy that company's data directory.

WARNING: Selecting the Destroy Data option deletes all files in this company's data directory specified in the TimeDesk Data Path field. It then removes the directory after the files have been deleted. Please use caution while using this function of TimeDesk.

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.

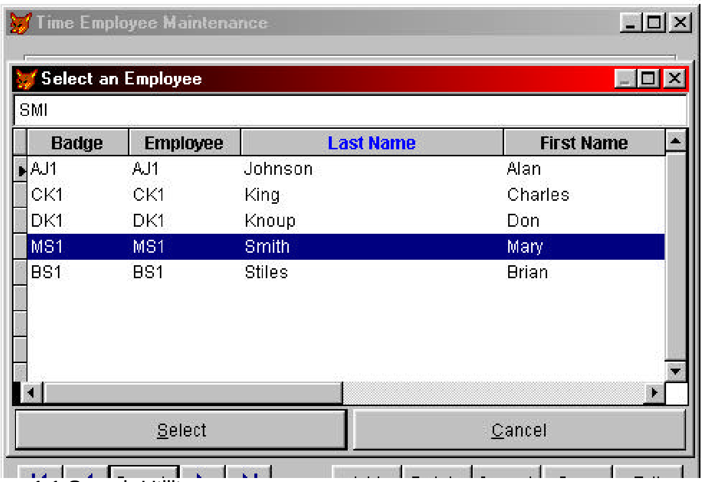
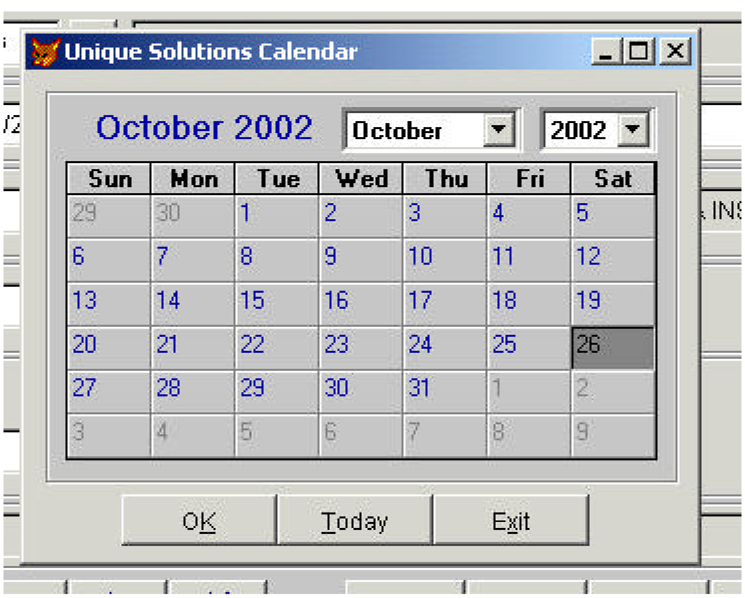


Figure 1.1 Search Utility

You can change the search order by clicking on the column heading. Once you have found the record you want. You can double click the item, press enter while the item is highlighted, or click on the Select button to choose that record.

Pop-Up Calendar

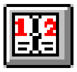
There is a handy pop-up calendar that can be accessed by Double-Clicking on any date field throughout the TimeDesk system. The pop-up calendar gives the user a month by month view. You can change the month that you are viewing by clicking on the month drop down at the top right of the screen and then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

Figure 1.2 Pop-Up Calendar

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. You can switch employees by selecting an employee from the drop-down list at the right side. 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.

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.

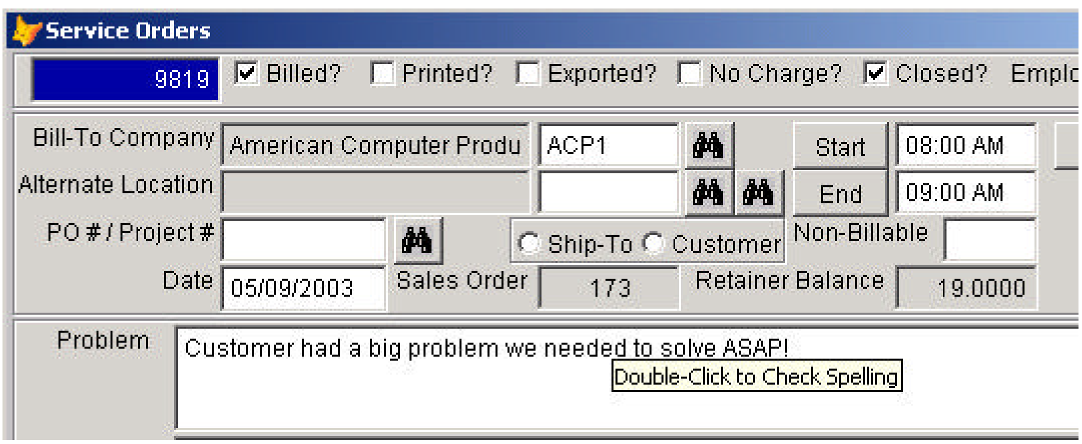


Figure 1.3 A Double-Click activates the spell check feature.

Chapter 2 – File Menu

Selecting a Company

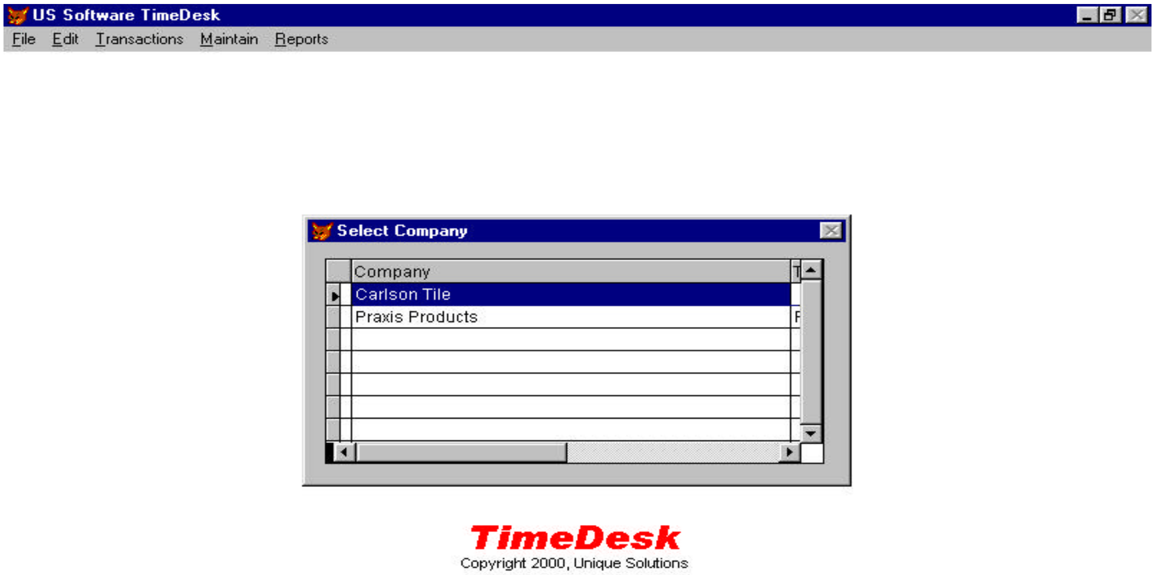


Figure 2.1 Selecting a Company

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 or by pressing the button labeled “Co” on the toolbar.

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 TimeDesk 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 TimeDesk when using this utility.

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

Security – User Login

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.

Security – User Maintenance

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.

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:

Security Access Items
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.

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. Clicking on the printer icon, which is found on the Print Preview Toolbar, will print this report on your Windows default printer.

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.

E-Mail Signature

Each user can personalize their own email signature with the Email Signature option. To edit the email signature, go to File/Users menu and select Email Signature. The text typed on this screen will automatically appear at the bottom of each email message created by this user.

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 FoxPro? report writer is required for this function. Please refer to the Microsoft Visual FoxPro documentation for more details.

Any of the report forms within TimeDesk can be modified using this option. Please note that the name of each report is printed in the upper right corner of each report.

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.

Label forms are used rather than report forms for reports which require columnar data, such as the Transaction Code Listing and the Employee Badges. Any of the label forms within TimeDesk can be modified using this option.

Chapter 3 – Working With Transactions

Service Orders

There are three different ways to access the service order entry screen. Number one is by simply starting the software. This is the first screen that appears each time the software is run. The second is by selecting Service Orders from the Transactions menu. The final option is to click on the Service Order Entry button on the toolbar.

Service Orders are the place to record each individual service record for billing to a client. Service orders can be entered in a problem/resolution format. A problem can be entered and the service order can be left Open for a user to come back later and fill in a resolution and to close the ticket. Or they can simply be entered with a description and closed at the time of entry. The Closed check box at the top of the screen specifies whether or not a service order is open or closed. Only closed service orders may be billed with the Build Sales Order function. Many reports such as the Service Order Status report can be filtered by Open, Closed, or Both.

Adding A New Service Order

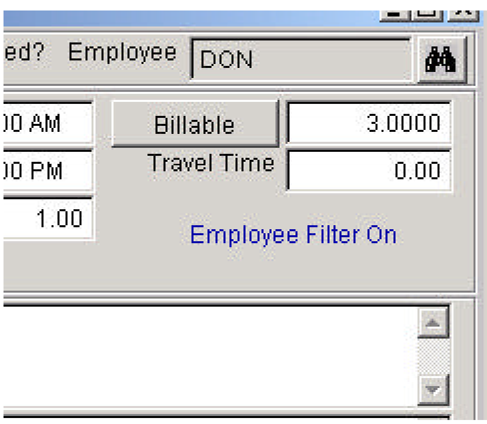
You begin adding a new service order by first clicking the Add button at the bottom of the Service Orders screen. A pop-up list appears which will prompt you to select a customer for which this service is being performed. After selecting a customer, you are returned to the Service Orders screen. Now that the bill-to location has been chosen, you can optionally select an alternate location. The alternate location can be one of this customer's ship-to location (as set up in the accounting system) or it could be another customer. The purchase order field can be used specify a purchase order number or could be used as a project reference. This number than would carry through to the purchase order field on the Sales Order if linked to an accounting system. The purchase order field can be a handy way to service orders for billing purposes. The reason for this, is that when you build sales orders, each unique purchase order creates a separate sales order in the accounting system. Otherwise when building sales orders, the system combines all of the open tickets at that point in time for a particular customer onto one single sales order.

Start and End times can be entered in by hand or can automatically be filled in with the current time when the Start or End button is clicked. The non-billable field is used to reference the number of hours which should not be billed. For example, let's say an employee has a start time of 10:00 AM and an end time of 2:00 PM. However, that employee stopped working at 12:00 PM for a one hour lunch. By entering 1 hour in the non-billable field, that time will then be deducted from the 10:00 AM to 2:00 PM calculation. To calculate the hours worked based on the start time and end time minus the non-billable hours, click the Billable button. The number of hours then appears in the Billable field. In our example it would show 3 hours. The travel time field can be used to optionally reference the number of travel hours used for this service order. This allows for billing the time spent by the employee traveling to and from the customer.

Now we can enter the description of the work performed. TimeDesk allows the user to enter both a problem and resolution to describe the work that was performed. The user can optionally use either one of these fields or both to describe the service performed. If you wish to record an expense record along with this service order, check the Expense? checkbox. This enables data entry in the miles, cost, and expense description fields. Data entered here can later be printed by employee on the expense report.

Along the top row of the Service Order screen are the status check-boxes. The Billed? check box is automatically checked when a sales order is built. You can also check this box when adding a service order if you wish for it not to be sent to sales orders. This is useful in any instance where you wish to record a service order but do not want any reference of the order sent to/billed to the customer. An example of this would be for an expense only service order. An order where you simply wished to record an expense but do not wish to bill the client. The No Charge? check box is used to reference the service order as a zero cost/no retainer usage order. This check box should only be used when you wish to send a zero cost invoice to a customer. This is a way to reference work that was performed so that the customer can see that the work was performed however. When the sales order for this service ticket is created, there is no cost associated with the labor, nor are there any retainer hours used (assuming they would have a retainer balance). On the right side is the Closed? check box. This box is checked to reference that a service order has been completed. Only closed service orders can be billed to the customer.

More Information About the Service Order Screen



The Printed? and Exported? check boxes at the top of the screen are automatically updated whenever a service order is printed/exported from the respective options on the File menu. You can also manually check these fields when entering the service order to avoid them from being printed/exported. The Sales Order field is used to reference a Sales Order number for service orders that have already been billed. By default all new service orders will default to the currently logged in employee. Likewise when navigating forward, backward, etc. through records on the service order screen their is a filter set by default which limits the records to only those created by the currently logged in employee. You'll notice the words "Employee Filter On" in the upper right corner of the service order screen, just below the travel time. These words indicate that the filter is active. To deactivate the employee filter, you must double click on the Employee label.

You may also change the assigned employee on any particular service order by clicking on the "Find Employee" button next to the employee number field. This changes the employee on the currently displayed service order.

On the uppermost left corner is the service order number display. This displays the automatically assigned incremental number that is associated with the currently displayed service order. At the bottom of the screen, there are navigational buttons as well as a Search button for locating a specific service order.

The Sales Order field, which is found just right of the service date, shows the sales order number that was created from this service ticket with the "Build Accounting System SO's" function. Obviously this field is blank until the sales order has been built.

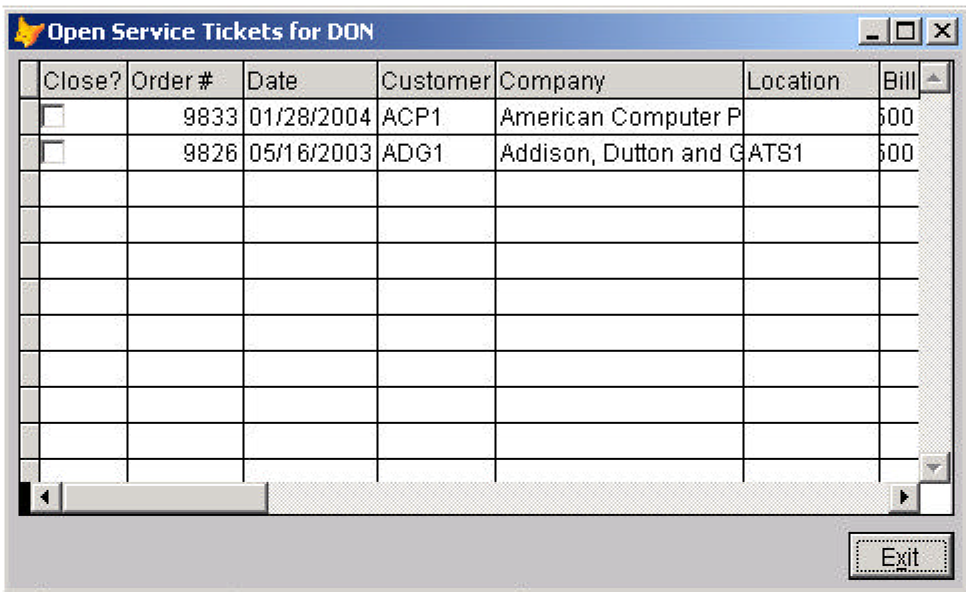
The Retainer Balance field shows the current retainer balance for the selected customer. It does not reflect any tickets, which are entered (including the one being viewed on the screen) but have not yet been built into a sales order. Only the "Build Accounting System SO's" function will reduce retainer balance.

Sending an E-Mail Copy of a Service Order

An HTML e-mail version of the service order can be emailed to the customer directly from the Service Orders screen. Click on the e-mail service order button at the bottom of the screen to send the email message to the customer. The customer will receive an email with the detail of the current service order, which is displayed on the screen. The email will be sent to the email address on record for this customer. It will be sent from the currently logged in user's email address. Please see User Maintenance for more information about using the e-mail features of TimeDesk.

Open Service Orders

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.

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.

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

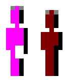
The Build Accounting System SO's screen can be accessed from the Transaction menu. The build SO function is used for creating Sales Orders in the linked accounting system from the service tickets that have been entered. This function can only be used when TimeDesk is linked to an accounting system.

WARNING: Only closed service tickets that have not already been billed can be billed. Please see the service order screen for more information on closing work orders and the billed check box.

The Build Accounting System SO's function allows the user to filter service orders by Company, Date Range, and Employee ID. This allows for building a filter portion of the closed/unbilled service orders that are in the system. By leaving these filter fields blank, all of the closed service orders that have not been billed will be built into Sales Orders.

Chapter 4 –Maintenance

Customer Maintenance



The customer maintenance screen can be accessed by either choosing Maintain/Customers from the menu or by clicking the customer maintenance icon on the toolbar. When linked to an accounting system, this maintenance screen shares data with the accounting system, such as the customer number, name, address, etc. The screen itself is broken into 5 segments; General, Notes, Dealer's Customers, Retainer History, Service History. As a convenience feature this screen is "hyperlinked" to the service screen. You will notice when you open the customer maintenance screen that it always starts on the last customer you viewed on the service orders screen. This can be useful when working on service tickets and you want to make a change to that customer's information.

General

The General tab contains basic demographic information about this particular customer as well as some user defined fields and expense information. When linked to an accounting software package the following fields of information come from the accounting system:

Accounting System Fields
Company Name
Address Line 1
Address Line 2
City
State
Zip
Customer Number
Phone
Fax
Contact
Customer Type
Dealer Number

All other data on this screen is kept inside of TimeDesk's own data file or when not linked to an accounting system the above data is also kept in TimeDesk's own data files. Expense information can be tracked by customer. Mileage to and from client's location can be placed here as well as a standard expense amount for tolls, parking fees, etc. This information is automatically filled in by default when creating new service orders for this customer.

A double-click on the word "Dealer" will take you directly to the customer record of the dealer whose customer number is specified in the dealer field on the General tab.

Notes

The Notes tab is the place to keep misc. comments and information about the customer. There is a field labeled accounting and one labeled TimeDesk. The field labeled accounting actually shows the notes field from the linked accounting system when one is linked. This allows both TimeDesk and the accounting software users to share the same note information.

Dealer's Customers

Under the Dealer's Customer tab we find all of the customer records in which this customer is marked as the dealer. You may have noticed that there was a "Dealer" field on the general tab. This gives you a way to group customers together under another customer. This can be used for tracking Dealers and their End-User Customers or Distributor's and their End-Consumers or Master Distributors and their Distributors and so on. Basically this is a way to view a hierarchical display of your customer data. For each End-User's customer record you would mark the Dealer/Distributor's customer number in the dealer field on the General Tab. Then when viewing the Dealer/Distributor's customer record you can click on the Dealer's Customer tab and see all of the End-User's associated with that particular Dealer or Distributor. This is an optional feature than can be used when needed. On the Dealer's Customer grid you may double click any record on that list to "drill-down" to their customer record. This drill-down feature will navigate you through the file to that customer's record.

Retainer History

The Retainer History tab is used both for viewing the history of retainer usage, but also for creating new retainers. The grid shows any retainers that are created as a positive number while retainer usage is shown as a negative. Also listed in the grid is the service order number on which the retainer was used. At the bottom of the screen, is found the mechanism for entering new retainers. Retainers can be added in any increment of hours by entering the number of hours in the box in the lower left corner of the screen next to the button labeled "Add Retainer Hours". By clicking on the Add Retainer Hours button the hours will be added to this customer's open retainer balance a new retainer record added to history and a Sales Order is also created (when linked to an accounting system) so that the prepaid retainer hours can be billed to the customer.

Service History

Service History tab on the customer maintenance screen serves as a way to inquire about past service history for this customer. It displays all service orders created for this customer. And, it gives the user the ability to double click on any service history record and navigate directly to that service order on the service entry screen.

Mail Merge

The Mail Merge tab on the customer maintenance screen is used to view which mail merge documents and e-mail's have been created for that customer and for creating new mail merge documents. To use the Mail Merge functions, Microsoft Office ? must first be installed on the PC. Mail Merge uses Microsoft Word ? to merge customer information such as company name, address, etc. with a Word Document.

Before you will be able to create mail-merged documents for a customer, you must first create a template. Please see the section on Mail Merge Templates later in this chapter for more details on how to create the template file.

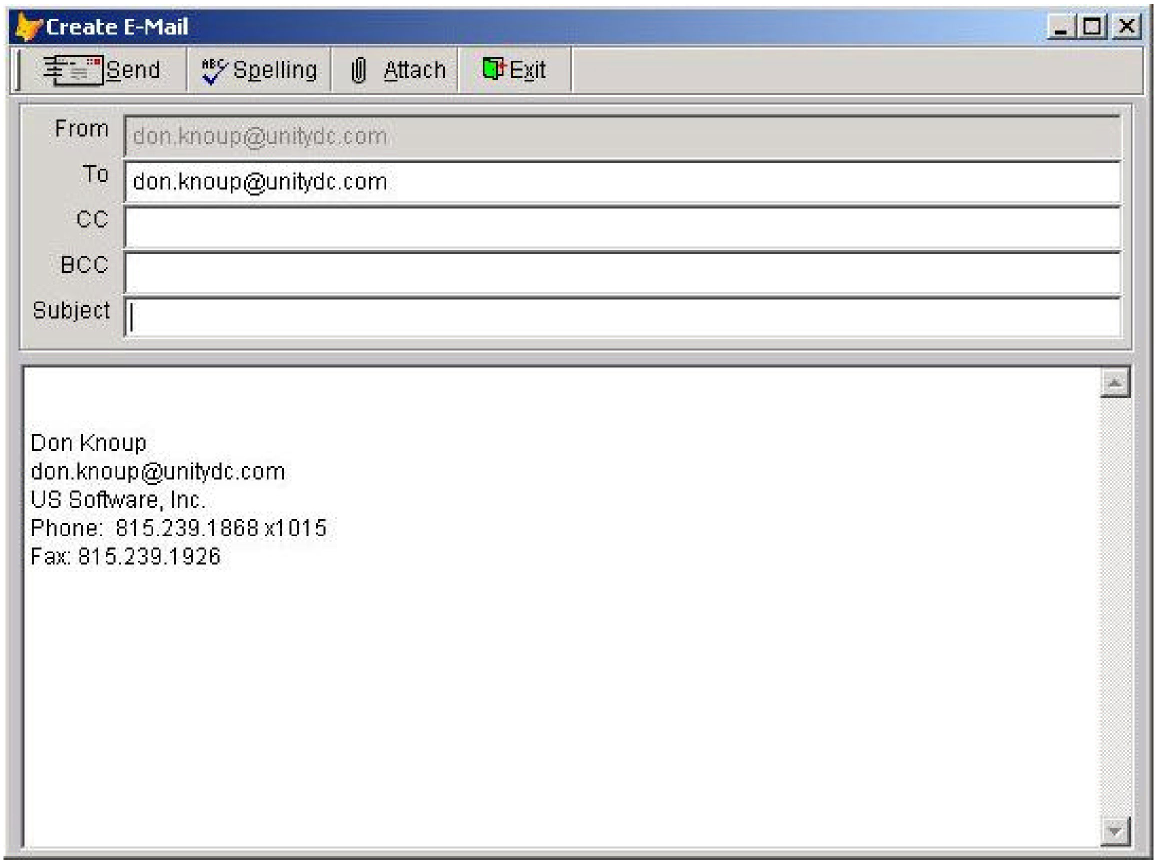
Once you have created a document template you can use the New Document button at the bottom of the Mail Merge page to create a new mail merge document in Microsoft Word ? . After clicking the New Document button a selection screen will appear. Select the document template you wish to use, from the list that appears. After creating a new document it will then be recorded in the mail merge history grid.

Developer Note: This mail merge document file will be stored in a folder called DOCS under the directory where the Unity Data Files are stored.

To edit an existing document that was previously created, double-click any Document listed in the grid. By double-clicking, you can open that document in Word. If you double-click on an E-mail Message, it will open the e-mail message so that you can view the message and you can also re-send the message if you wish. A double-click on a E-Mail Service Order will take you directly to that service order record in the service orders screen.

Internet E-Mail

Sending an internet e-mail message to your customer can be as easy as clicking a button. Click on the Send E-Mail button at the bottom of the customer screen to send the selected customer an e-mail message. Once you click on the button the create e-mail screen will appear.



Clicking the Send button sends the message to the specified recipients. The "To" field is used for the recipients email address, the "CC" is for specifying an e-mail address to send a copy of the email to, and the "BCC" is used for a Blind Carbon Copy. The Spelling button can be clicked on to check the spelling of the email. Note: This feature requires Microsoft Office to be installed. The Attach button provides the user with a method for attaching files to the email message to be sent along with the message. Once you click attach, you are then prompted to select the file you wish to attach.

You must have specified a valid e-mail address and SMTP Server in User Maintenance in order to use the e-mail feature. Please see User Maintenance topic for more information.

Customer Type List

The customer type maintenance screen is used maintain the list of different customer types. This optional table allows you to create a list of different customer types. These customer types can then be used to segregate customers into separate groups for reference purposes and for use in filtering reports. Once you have added customer types into the customer type maintenance screen than you can use those types in the customer maintenance screen to designate a specific type value for each customer.

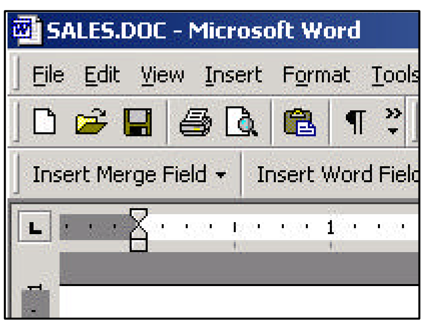
Mail Merge Templates

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 Office? . 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.

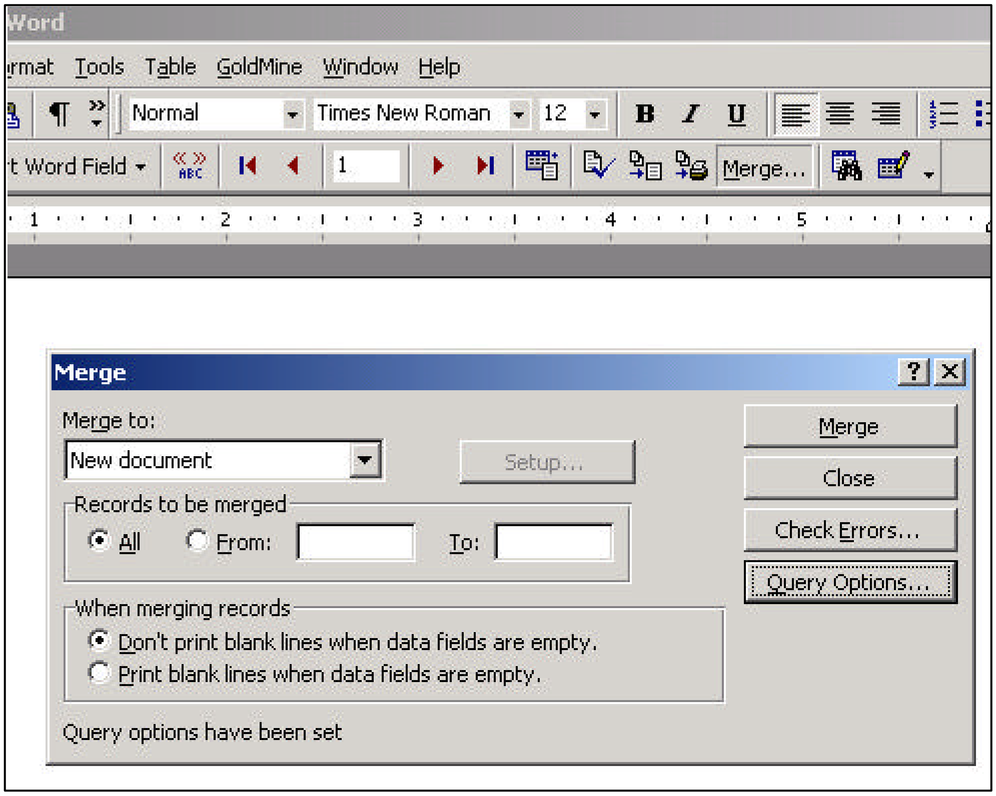
For more information about creating Word documents, please refer to your Microsoft Office documentation.

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.

Chapter 5 – Reports

Customer Service Report Summary

The Customer Service Summary Report, found on the Reports menu, prints a summarized report of service order information by service order number. The report prints one row per service order and shows such information as the service order number, date, and billable hours. The Customer Service Summary Report can be filtered by; Company, Alternate Location, Date Range, Employee ID, and Status.

Customer Service Report Detail

The Customer Service Detail Report, found on the Reports menu, prints a detailed report of service order information by service order number. The Customer Service Detail Report can be filtered by; Company, Alternate Location, Date Range, Employee ID, and Status.

Service Order Status

The Service Order Status Report, found on the Reports menu, prints a list of Service Orders and there status which is recorded in the Service Order screen. The Service Order Status Report can be filtered by; company, alternate location, date range, employee ID, and status.

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 menu, prints a graph of billed hours for Employees with all of the information, which is recorded in the Service Order screen. The Monthly Hours Billed Chart can be filtered by; date range and employee ID.

Expense Report

The Expense Report, found on the Reports menu, prints an Expense Report for Employees with all of the information, which is recorded in the Service Order screen. The Expense Report can be filtered by; date range and employee ID.

Retainer History Report

The Retainer History Report, found on the Reports menu, prints a Retainer History Report for Customers with all of the information, which is recorded in the customer screen. The Retainer History Report can be filtered by date range, customer, and customer type which can be revised in the Maintain menu.

Open Retainer Balance Report

The Open Retainer Balance Report, found on the Reports menu, prints a Open Retainer Balance Report for Customers with up to date retainer information which is recorded in the Customer screen. The Open Retainer Balance Report is filtered by Customer.

RMA Report

The RMA Report, found on the Reports menu, prints a RMA Report with information, which is recorded in the RMA transactions screen. The report shows the RMA #, company name and notes, as well as the date that the RMA was entered. The RMA Report can be filtered by RMA #, customer number, date range, and status.

Appendix A – Data Dictionary

Structure for Table: ARCADR.DBF

Description: Customer Ship-To Address Table (Not used when linked to Accounting System)

Field Name	Type	Width	Dec	Index	Notes
1 ADDDATE	Date	8			
2 ADDRESS1	Character	30			
3 ADDRESS2	Character	30			
4 ADDTIME	Character	8			
5 ADDUSER	Character	4			
6 CITY	Character	20			
7 CODE	Character	2			Misc. Code
8 COMMENT	Character	65			
9 COMPANY	Character	35			
10 CONTACT	Character	20			
11 COUNTRY	Character	15			
12 CSHIPNO	Character	6			Customer Ship To #
13 CUSTNO	Character	6		Asc	Not used currently
14 DEALER	Character	6			
15 DEFASHIP	Character	1			
16 DISC	Numeric	7	3		
17 FAXNO	Character	20			
18 FOB	Character	12			
19 GLLINK	Character	3			
20 PHONE	Character	20			
21 SALESMN	Character	4			
22 SHIPID	Character	20			
23 SHIPVIA	Character	12			
24 STATE	Character	10			
25 TAX	Numeric	7	3		
26 TAXDIST	Character	4			
27 TAXTBL	Character	10			
28 TERR	Character	2			
29 TITLE	Character	20			
30 ZIP	Character	10			

Index Structure of Table: ARCADR.DBF

Structural CDX File: ARCADR.CDX

Index Tag	Expression	Filter
CUSTNO1	CUSTNO+CSHIPNO	
CUSTNO	CUSTNO	

Structure for Table: ARCUST.DBF

Description: Customer Master Table (Not used when linked to an Accounting System)

Field Name	Type	Width	Dec	Index	Notes
1 ADDRESS1	Character	30			
2 ADDRESS2	Character	30			
3 ARLIMIT	Numeric	7	0		
4 BALANCE	Numeric	12	2		
5 CITY	Character	20			
6 CODE1	Character	6			Misc. Code 1
7 CODE2	Character	6			Misc. Code 2
8 CODE3	Character	6			Misc. Code 3
9 CODE4	Character	6			Misc. Code 4
10 COMPANY	Character	35			
11 CONTACT	Character	20			
12 COUNTRY	Character	15			
13 CREDIT	Numeric	12	2		
14 CUSTNO	Character	6			Customer Number
15 DEALER	Character	6			Dealer Customer Number
16 DISC	Numeric	7	3		
17 EMAIL	Character	40			
18 ENTERED	Date	8			
19 FAXNO	Character	20			
20 INDUSTRY	Character	6			
21 NOTES	Memo	4			
22 PHONE	Character	20		Asc	Phone Number
23 SALESMN	Character	6			
24 STATE	Character	10			
25 TAX	Numeric	7	3		
26 TAXDIST	Character	10			
27 TERMS	Character	20			
28 TITLE	Character	20			
29 ZIP	Character	10			

Index Structure of Table: ARCUST.DBF

Structural CDX File: ARCUST.CDX

Index Tag	Expression	Filter
CUSTNO	CUSTNO	
COMPANY2	UPPER(COMPANY)	
CONTACT1	UPPER(CONTACT)	
PHONE	PHONE	

Structure for Table: CUSTOMER.DBF

Description: TimeDesk Customer Table

Field Name	Type	Width	Dec	Index	Notes
1 MILE	Numeric	10	2		Round Trip Miles
2 EXP	Numeric	10	2		Default Expense Amount
3 CUSTNO	Character	6			Customer #
4 USER1	Character	50			User Defined Field #1
5 USER2	Character	50			User Defined Field #2
6 USER3	Character	50			User Defined Field #3
7 USER4	Logical	1			User Defined Field #4
8 NOTES	Memo	4			Notes
9 TRAVELTIME	Numeric	10	4		Not Used
10 SNSF	Character	9			Not Used
11 SNUN	Character	9			Not Used
12 SNIC	Character	9			Not Used
13 SNRT	Character	9			Not Used
14 SNRE	Character	9			Not Used
15 VERSF	Character	5			Not Used
16 VERUN	Character	5			Not Used
17 VERTI	Character	5			Not Used
18 VERRT	Character	5			Not Used
19 VERRE	Character	5			Not Used
20 VERIC	Character	5			Not Used
21 SMADATE	Date	8			Not Used
22 SHIPTO	Character	10			Not Used
23 RETAINER	Numeric	10	4		Pre-Paid Retainer Balance
24 MFGSYST	Character	50			Not Used
25 MFGSOURCE	Logical	1			Not Used

Index Structure of Table: CUSTOMER.DBF

Structural CDX File: CUSTOMER.CDX

Index Tag	Expression	Filter
CUSTNO	CUSTNO	

Structure for Table: CUSTTYPE.DBF

Description: User Defined Customer Type List

Field Name	Type	Width	Dec	Index	Notes
1 CUSTTYPE	Character	8			Customer Type

Index Structure of Table: CUSTTYPE.DBF

Structural CDX File: CUSTTYPE.CDX

Index Tag	Expression	Filter
CUSTTYPE	CUSTTYPE	

Structure for Table: ICITEM.DBF
Description: Not used at this time.

Field Name	Type	Width	Dec	Index	Notes
1 ALOC	Numeric	12	3		Allocated
2 DECIMALS	Numeric	1			Decimal Places
3 ITEM	Character	15			Item Number

Structure for Table: MAILHIST.DBF

Description: E-Mail Message History Table

Field Name	Type	Width	Dec	Index	Notes
1 ADDRBCC	Memo	4			Blind Carbon Copy
2 ADDRCC	Memo	4			Carbon Copy
3 ADDRFROM	Character	50			From
4 ADDRTO	Memo	4			Recipient
5 CUSTNO	Character	6		Asc	Customer #
6 MESSAGEID	Integer	4		Asc	Message ID
7 MSGTEXT	Memo	4			Message Text
8 SUBJECT	Character	240			Subject of Message
9 USER	Character	12			User ID

Index Structure of Table: MAILHIST.DBF

Structural CDX File: MAILHIST.CDX

Index Tag	Expression	Filter
CUSTNO	CUSTNO	
MESSAGEID	MESSAGEID	

Structure for Table: PROJECTS.DBF

Description: Customer Projects Table

Field Name	Type	Width	Dec	Index	Notes
1 COMPDATE	Date	8			Completion Date
2 CONTACT	Character	25			Contact Name
3 CUSTNO	Character	6			Customer #
4 DESCRIP	Character	35		Asc	Description
5 NEEDDATE	Date	8			Date Needed
6 NOTES	Memo	4			Notes
7 PHONE	Character	20			Contact Phone #
8 PONUM	Character	20			Project # / PO #
9 STARTDATE	Date	8			Date Started

Index Structure of Table: PROJECTS.DBF

Structural CDX File: PROJECTS.CDX

Index Tag	Expression	Filter
DESCRIP	DESCRIP	
CUSTNO1	CUSTNO+PONUM	

Structure for Table: RMADETL.DBF

Description: Returned Merchandise Authorization Detail Table

Field Name	Type	Width	Dec	Index	Notes
1 RMANO	Integer	4		Asc	RMA #
2 QTY	Numeric	10			Quantity
3 ITEM	Character	15			Item #
4 ITMDESC	Character	60			Description
5 NOTES	Memo	4			Notes

Index Structure of Table: RMADETL.DBF

Structural CDX File: RMADETL.CDX

Index Tag	Expression	Filter
RMANO	RMANO	

Structure for Table: RMAHEAD.DBF

Description: Returned Merchandise Authorization Master table.

Field Name	Type	Width	Dec	Index	Notes
1 RMANO	Integer	4		Asc	RMA #
2 CUSTNO	Character	6		Asc	Customer #
3 ENTERED	Date	8			Date RMA Was Entered
4 RECVD	Date	8			Date Item(s) Was Received
5 SENT	Date	8			Date that Item(s) Was Returned to the Original Manufacturer
6 REDVD2	Date	8			Date that Item(s) was Received Back From the Original Manufacturer
7 SENT2	Date	8			Date that Item(s) Was Sent Back to Customer
8 MFGRMA	Character	20		Asc	Manufacturer's RMA #
9 VENDNO	Character	6		Asc	Vendor #
10 Notes	Memo	4			Notes
11 Closed	Logical	1			Closed?

Index Structure of Table: RMAHEAD.DBF

Structural CDX File: RMAHEAD.CDX

Index Tag	Expression	Filter
MFGRMA	MFGRMA	
CUSTNO	CUSTNO	
RMANO	RMANO	
VENDNO	VENDNO	

Structure for Table: RTNRHIST.DBF
Description: Retainer History Table

Field Name	Type	Width	Dec	Index	Notes
1 CUSTNO	Date	8		Asc	Customer #
2 DATE	Character	12		Asc	Transaction Date
3 SONO	Character	10			Sales Order #
4 INVNO	Character	10			Not Used
5 DESCRIPT	Character	10			Description
6 HOURS	Character	10			Hours

Index Structure of Table: RTNRHIST.DBF

Structural CDX File: RTNRHIST.CDX

Index Tag	Expression	Filter
CUSTNO	CUSTNO	
DATE	DATE	
CUSTNO2	CUSTNO+DTOS(DATE)	

Structure for Table: SERVICE.DBF

Description: Service Orders Table

Field Name	Type	Width	Dec	Index	Notes
1 CUSTNO	Character	6		Asc	Customer #
2 LCUSTNO	Character	6		Asc	Alternate Location #
3 LTYPE	Numeric	1			Alternate Location Type
4 ONSITE	Logical	1			On Site?
5 EXP	Numeric	10	2		Expense Amount
6 MILE	Numeric	10			Round Trip Miles
7 SERVICEREC	Integer	4		Asc	Service Order #
8 SERVICEDAT	Date	8		Asc	Service Date
9 EMPLOYEEID	Integer	4			Not Used
10 PROBLEMDES	Memo	4			Problem Description
11 LABORHOURS	Numeric	10	4		Billable Hours
12 CLOSED	Logical	1			Completed Order?
13 NONBILLABL	Numeric	8	2		Non-Billable Hours
14 STARTTIME	Date/Time	8			Start Time
15 ENDTIME	Date/Time	8			End Time
16 RESOLUTION	Memo	4			Resolution Description
17 TRAVELTIME	Numeric	8	2		Travel Time Hours
18 TELEPHONES	Logical	1			Not Used
19 STARTTIMET	Date/Time	8			Not Used
20 ENDTIMETO	Date/Time	8			Not Used
21 STARTTIMED	Date/Time	8			Not Used
22 ENDTIMEDEP	Date/Time	8			Not Used
24 EXPORTED	Logical	1			Exported?
25 BILLED	Logical	1			Billed to Customer?
26 EXPENSE	Logical	1			Expense Ticket?
27 PONUM	Character	20			Purchase Order #
28 USER	Character	12		Asc	User ID
29 EXDESCRIP	Memo	4			Expense Description
30 PRINTED	Logical	1			Service Order Form Printed?
31 SONO	Character	10			Sales Order #
32 BILLLOCN	Character	6			Bill-To Location ID
33 SHIPLOCN	Character	6			Ship-To Location ID
34 NOCHARGE	Logical	1			Create No-Charge Sales Order

Index Structure of Table: SERVICE.DBF

Structural CDX File: SERVICE.CDX

Index Tag	Expression	Filter
SERVICEREC	SERVICEREC	
USER	USER	
CUSTNO	CUSTNO	
SERVICEDAT	SERVICEDAT	
CUSTNO2	CUSTNO+LCUSTNO	
LCUSTNO	LCUSTNO	

Structure for Table: TDSYST.DBF

Field Name	Type	Width	Dec	Index	Notes
1 SY_TAG	Character	10		Asc	Unique Field Name
2 SY_NUMBER	Double	8			Next Unique Number

Index Structure of Table: TDSYST.DBF

Structural CDX File: TDSYST.CDX

Index Tag	Expression	Filter
SY_TAG	SY_TAG	

Structure for Table: TEMPLATE.DBF

Field Name	Type	Width	Dec	Index	Notes
1 DOCNAME	Character	8			Session ID
2 DESCRIP	Character	10			Pay Type
3 USER	Character	9			Employee ID
4 CREATED	Numeric	9	4		Hours Worked

Index Structure of Table: TEMPLATE.DBF

Structural CDX File: TEMPLATE.CDX

Index Tag	Expression	Filter
DOCNAME	DOCNAME	

Structure for Table: UNFLDS.DBF
Description: Data Table Field Definitions

Field Name	Type	Width	Dec	Index	Notes
1 TABLEID	Character	8		Asc	Table Name
2 FNAME	Character	10			Field Name
3 FTYPE	Character	1			Data Type
4 FWIDTH	Integer	4			Field Length
5 FDECIMAL	Integer	4			Decimal Places
6 DESCRIP	Memo	4			Description

Index Structure of Table: UNFLDS.DBF

Structural CDX File: UNFLDS.CDX

Index Tag	Expression	Filter
TABLEID	TABLEID	
TABLEID2	TABLEID+FNAME	

Structure for Table: UNTABLE.DBF

Description: Data Table Definitions

Field Name	Type	Width	Dec	Index	Notes
1 TABLEID	Character	8		Asc	Table Name
2 DESCRIP	Character	70			Description
3 SYSTEM	Logical	1			System Table

Index Structure of Table: UNTABLE.DBF

Structural CDX File: UNTABLE.CDX

Index Tag	Expression	Filter
TABLEID	TABLEID	

Structure for Table: UNTAGS.DBF
Description: Table Index Tag Definitions

Field Name	Type	Width	Dec	Index	Notes
1 TABLEID	Character	8		Asc	Table Name
2 TAGNAME	Character	10			Index Tag Name
3 TAGEXPR	Character	254			Index Expression

Index Structure of Table: UNTAGS.DBF

Structural CDX File: UNTAGS.CDX

Index Tag	Expression	Filter
TABLEID	TABLEID	

Structure for Table: UNUACT.DBF
Description: List of Active Users

Field Name	Type	Width	Dec	Index	Notes
1 USER	Character	12		Asc	User ID
2 LOGINDATE	Date	8			Date Logged In
3 LOGINTIME	Character	11			Time Logged In
4 Machine	Character	18			Not Currently Used

Index Structure of Table: UNUACT.DBF

Structural CDX File: UNUACT.CDX

Index Tag	Expression	Filter
USER	USER	

Structure for Table: UNUSERS.DBF

Description: User Security Table

Field Name	Type	Width	Dec	Index	Notes
1 USER	Character	12		Asc	User ID
2 USERNAME	Character	40		Asc	User Name
3 USERSTAT	Logical	1			User Status
4 PASSWORD	Character	15			Password
5 DLASTLOGIN	Date	8			Date of Last Login
6 TLASTLOGIN	Character	11			Time of Last Login
7 DEFUID	Integer	4			Not Used
8 PWLIFE	Numeric	3			Not Used
9 PWEXPIRES	Date	8			Not Used
10 MINPWLEN	Numeric	1			Not Used
11 PWHISTORY	Numeric	3			Not Used
12 PW1	Character	15			Not Used
13 PW2	Character	15			Not Used
14 PW3	Character	15			Not Used
15 PWSTATE	Numeric	1			Not Used
16 RSETUP	Numeric	1			Access Levels
17 RUSERM	Numeric	1			“
18 RMODFRX	Numeric	1			“
19 RFOXPRO	Numeric	1			“
20 RTRANS	Numeric	1			“
21 RMAINTAIN	Numeric	1			“
22 RREPORT	Numeric	1			“
23 EMAIL	Character	50			Internet E-Mail Address
24 SMTPSERV	Character	50			SMTP Server Address

Index Structure of Table: UNUSERS.DBF

Structural CDX File: UNUSERS.CDX

Index Tag	Expression	Filter
USER	USER	
USERNAME	USERNAME	

Appendix C – Client Files

The following files are required on each client machine. These are the Microsoft Visual FoxPro 8.0™ runtime DLL files. These files are installed in the <program files>\Common Files\Microsoft Shared\VFP folder when running the client installation.

FOXHHELP.EXE
FOXHHELPPS8.DLL
GDIPLUS.DLL
VFP8R.DLL
VFP8RENU.DLL
VFP8T.DLL

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