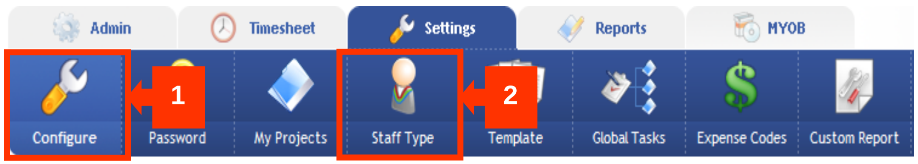
# Quick Guide to Getting Started (with MYOB)

INTERTEC TimePro

Before your Staff can start using your TimePro system, you (as the Administrator) need to complete the following simple steps. Log on to your TimePro system with the initial Admin Logon that has been provided.





### Step 1: Configure the Settings

Review **configuration options** in all categories as shown on the screen.

### Step 2: Define Staff Types - Admin, Contractor, Salary …

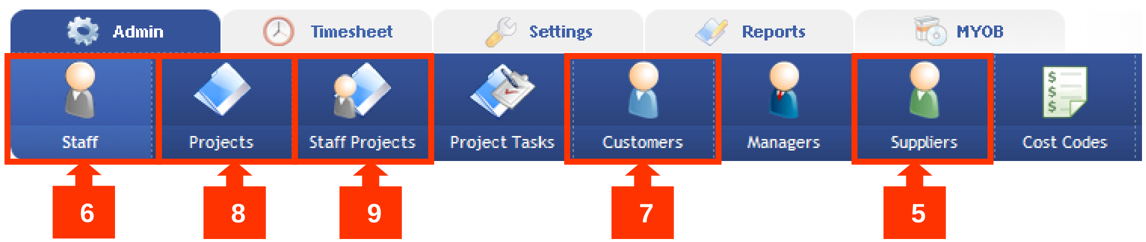
Review the default **Staff Type listings** and add new types if necessary.

### Step 3: Configure MYOB Settings

Set **configuration options** to match your requirements such as which MYOB product/version and invoicing options for Sales and Purchases.

### Steps 4: Add MYOB Activities, Customers & Suppliers

The quickest way is to set up these records is to import them into TimePro (using the **MYOB Import**) rather than adding them individually.




### Step 5: Add Suppliers ie. Contractor type staff

If you have any Contractor-type Staff then you should add your **Suppliers** next. If you are using TimePro with MYOB integration then you should refer to the MYOB setup instructions before continuing.

### Step 6: Add Staff

Add your **Staff**. *HINT - Make use of* ***Global Projects*** *and/or copy features to save time when setting up your Staff and Projects.*

### Step 7: Add Customers

Add your **Customers**.

### Step 8: Add Projects

Add your **Projects**.

### Step 9: Allocate your Staff to Projects

Allocate staff to your **Projects**. *HINT - If you have used the Global Projects function when setting up your Staff and Project records, then this function would have already allocated Staff to your Global Projects.*

### Basic Setup is Now Complete!

You can now inform your Staff that they can start using the system. If you have entered email addresses for all your Staff, then you can use the Email notification facility in TimePro to send out a **customised welcome message.**

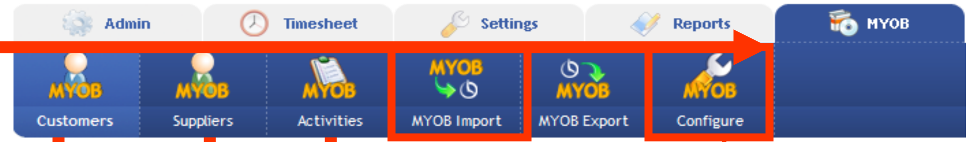
**Additional set up steps may be required depending on what features you've activated. These are shown overleaf.**

# MYOB Integration Summary

INTERTEC TimePro

## Step 1: Configure MYOB Settings

Set configuration options to match your requirements such as which MYOB product/version and invoicing options for Sales and Purchases.

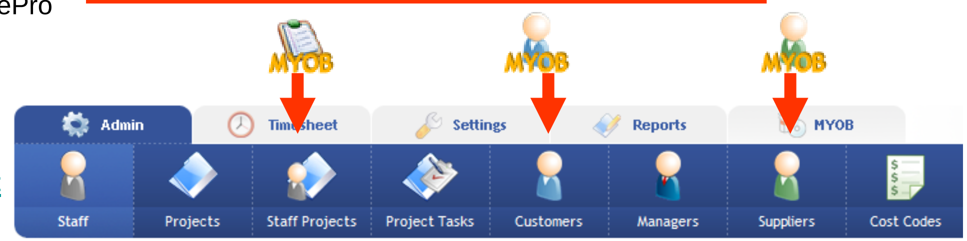



## Steps 2: Add MYOB Activities, Customers & Suppliers

The quickest way is to set up these records is to import them into TimePro (using the MYOB Import) rather than adding them individually.

## Step 3: Match MYOB entries with TimePro Records

After adding these MYOB entries, you will need to link them with the appropriate TimePro Customer, Supplier, Project and Staff Project records located in the Admin tab.



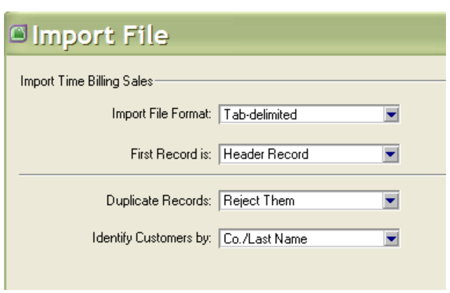

## Step 4: Export TimePro data to a .csv file

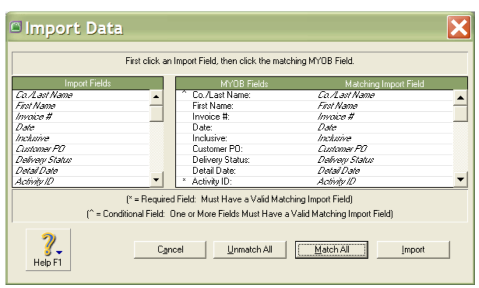
The MYOB Export facility gives you the ability to take the time records entered into TimePro and to export these records for generating Sales Invoices, Purchases Invoices and/or Activity Slips in MYOB. These records are first exported in a text file which is then imported into MYOB.

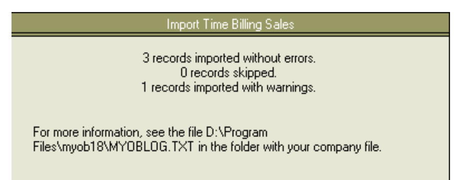
*Only Time records that have been marked as "Completed" are included as part of the export process. Therefore it is a good idea to use the Check Timesheets screen to check that staff have "Completed" their timesheets and to lock all timesheets before running an export.*

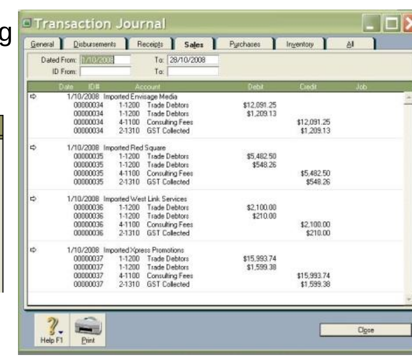

## Step 5: Import TimePro data into MYOB

The final step is to import the TimePro data (either sales/purchase invoice or activity slips information) into MYOB using MYOB Data Import Facility. **Important: perform a backup of your MYOB data file before starting the import.**



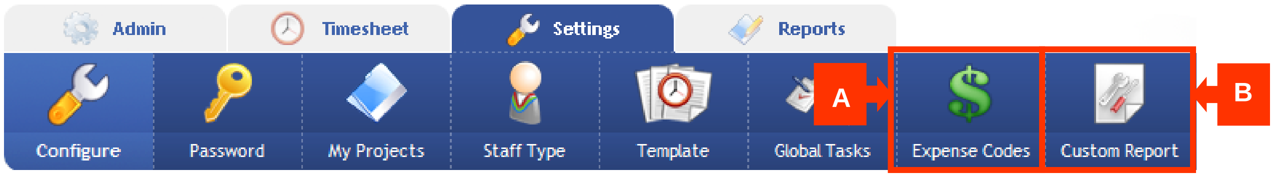



# Additional Setup Steps

These steps can be undertaken in any order.

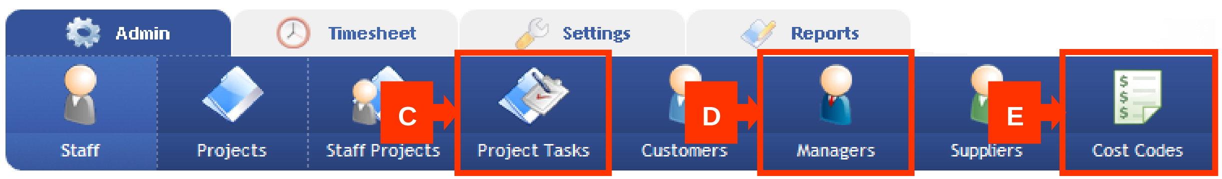



## A. Add Global Tasks

If you chose to use "global" Tasks in the "Time Entry Text Option" when configuring TimePro, then you can add your [Global Tasks ]now.

## B. Add Expense Codes

If you turned on "Track Expenses" and if you wish to categorise/code your expenses, then you can add your [Expense Codes ]now.




## C. Add Project-specific Tasks

If you turned on "Use Project-Specific Tasks" when configuring TimePro, then you can add your **Project-Specific Tasks** now.

## D. Add Managers

If you turned on "Use Authorisation" when configuring TimePro, then you can add your **Managers** now. *Note: once you have defined your Managers you should assign them to the* ***Projects*** *they are responsible for.*

## E. Add Cost Codes

If you turned on "Apply Cost Tracking to Staff Projects" when configuring TimePro, then you can add your Cost Codes now. *Note: once you have defined your Cost Codes you should apply them to the Projects your Staff work on.*

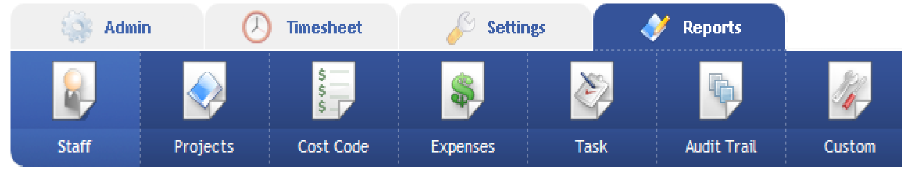
**Hints & Tips**

*If you have a significant volume of data to set up in the system, such as 50, 100 or even 200 or more staff, projects or customers, then it may be more economical to have your staff imported directly into the system for you by a TimePro consultant. The data to be imported should be provided to TimePro in a CSV or TAB delimited format. Note: There is usually a charge for this service.*

*Check out the TimePro Logon Anywhere Feature if you would like flexibility in how you log on to your TimePro system. This allows you to log on to TimePro directly from your existing web site or Intranet.*

# Further Information for Administrators

Now that you've got your TimePro system up and running what should you do next? You will be using the following key areas of TimePro on a regular basis to help ensure that your timesheet system is running efficiently with as little effort as possible.  Follow the links to take you to our online help.


## Monitoring your TimePro system

Use the **Check Timesheets** screen to keep an eye on who has entered and completed their timesheets and more importantly, you can also send reminder emails to Staff who have not.

On the **View Timesheet** screen you can select any of your Staff members and enter or make adjustments to their time entries.

## Retrieving information from the system: Batch Print

Use the **Timesheets Batch Print** facility to print out timesheets for your Staff to send out with your invoices. Timesheets can be printed for Staff on a project-by-project basis (ideal for invoicing) or on a consolidated Staff timesheet. You can also control the information that is displayed on the timesheet by choosing between the various Print templates. *Note: The View Timesheet screen can only print a timesheet for a single Project and a single Staff member at a time.*

## Retrieving information from the system: Exports

Depending on your requirements you may find the **Data Export** useful if you need to export your timesheet  or expenses information to another system or to analyse the data in a spreadsheet program such as MS Excel.

## TimePro Drill Down Data Viewer

Use the **Drill Down Data Viewer** found on many of the screens and reports within TimePro for a quick check of the underlying data records behind any of the figures you see.

## TimePro Reports

Review the numerous reports available in the TimePro system to determine which ones best match your requirements.

- Staff Reports
- Project Reports
- Cost Code Reports
- Task Reports
- Audit Trail Report

Note : If you have a very specific reporting requirement that is not covered by the standard TimePro Reports, then you can contact the TimePro Support to have a custom report developed for your business.

## Giving non-Admin Staff Access to Certain Administrator Functions

If you wish to release some of the TimePro reports and or TimePro Admin screens to non-Admin users then you can do so on the **Custom Reports Setup** screen. This allows you to setup a pseudo "third" level of access to the TimePro system by giving certain users access to Administrator features of your choosing.

## TimePro Compact Interface

This Compact Interface makes TimePro accessible to users of mobile PDA devices. It has a neat and reduced entry interface with all the core time entry functionality on the desktop. It operates on a Weekly timesheet view, with time entered on a daily basis and in worked hours format. *Note: There is no facility for submitting a timesheet via the Compact Interface. You will still need to log in to TimePro to submit a timesheet.*