



TimeTrak /MYOB Extra Fields

White Paper
3.2 - 2015

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Introduction

Welcome to TimeTrak Professional.

In TimeTrak we have many features which requires some set up behind the scenes around extra fields in both MYOB EXO and TimeTrak itself.

In this white paper we will show you all the options and how they work in TimeTrak.

If you have any questions or concerns please contact a team member at Focus by either emailing **support@exosoft.net.nz** or for urgent support please *email and then call*

NZ - 0800 12 00 99

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MYOB EXO Extra Field Setup

There are quite a few extra fields added into MYOB EXO in various tables to allow TimeTrak to post back into MYOB EXO seamlessly and to allow organisations to have greater flexibility in both MYOB EXO and TimeTrak.

Lead and Secondary Providers

In TimeTrak we have Lead and Secondary providers. These are used for users who have the most client or job familiarity and will allow service coordinators to be able to assign tasks and jobs to the correct staff people.

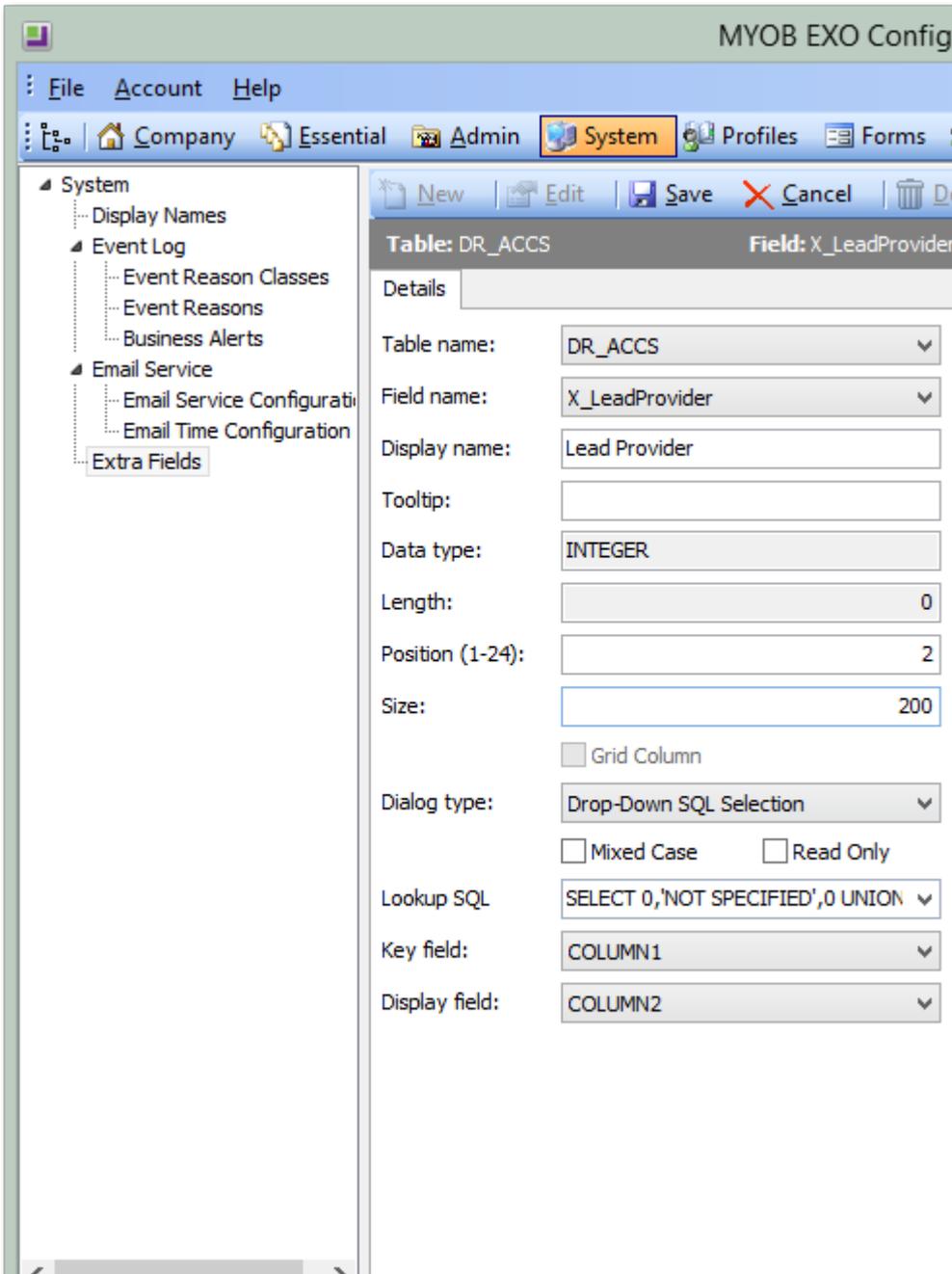
There are two places in MYOB EXO where the Lead and Secondary provider can be set up, against the Debtor Account and against the Job itself.

In the DR_ACCS table the two extra fields are X_LeadProvider and X_SecondaryProvider

In the MYOB Exo Configurator Module users will need to enter set up the extra fields for each option.

The extra fields already exist in the MYOB EXO database.

They should look like this:

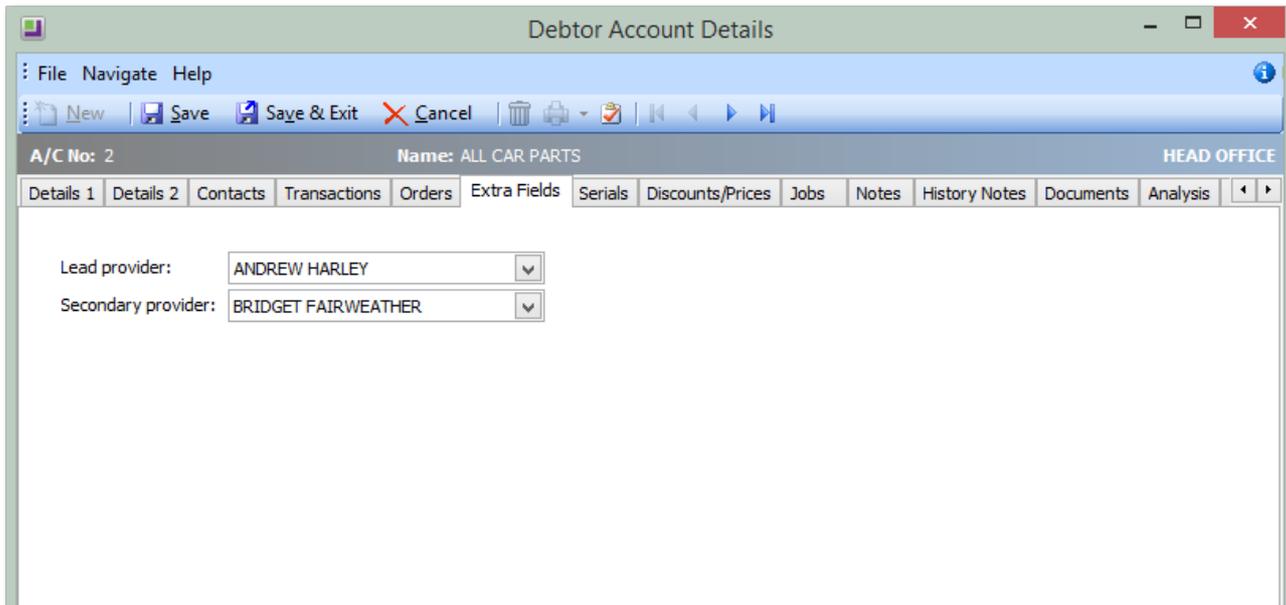


The Drop-Down SQL is this:

`SELECT 0, 'NOT SPECIFIED', 0 UNION SELECT StaffNo, Name, 1 FROM STAFF WHERE IsActive = 'Y' ORDER BY 3, 2`

For Secondary Provider the SQL is the same but the extra field is called X_SecondaryProvider.

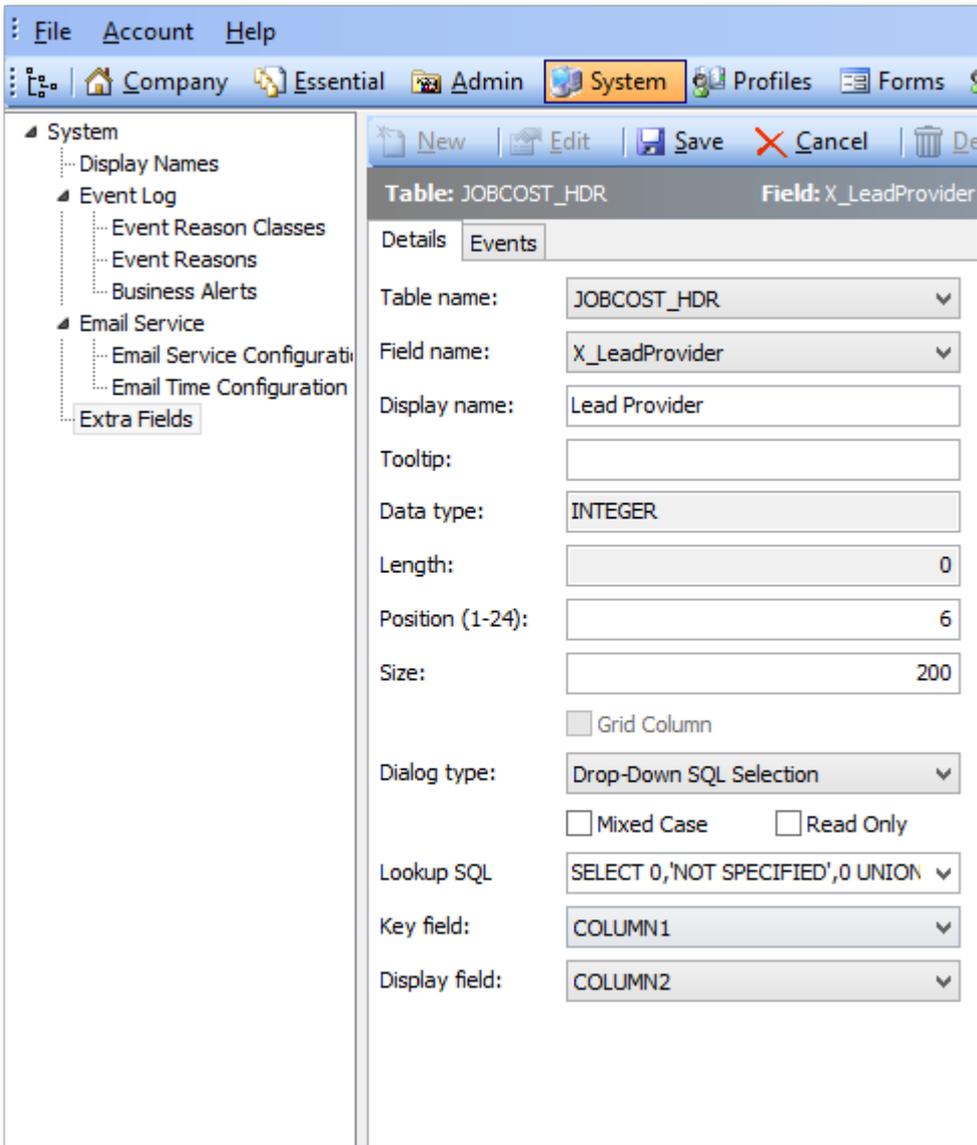
Once these are set up against the Debtors Table they are visible within MYOB EXO against the Debtors Account.



For the Lead and Secondary Provider to be set up on the Job, in the Jobcost_hdr table users will need to set up the two extra fields within the MYOB EXO Configuration Module.

The extra fields already exist in the MYOB EXO database.

They should look like this:

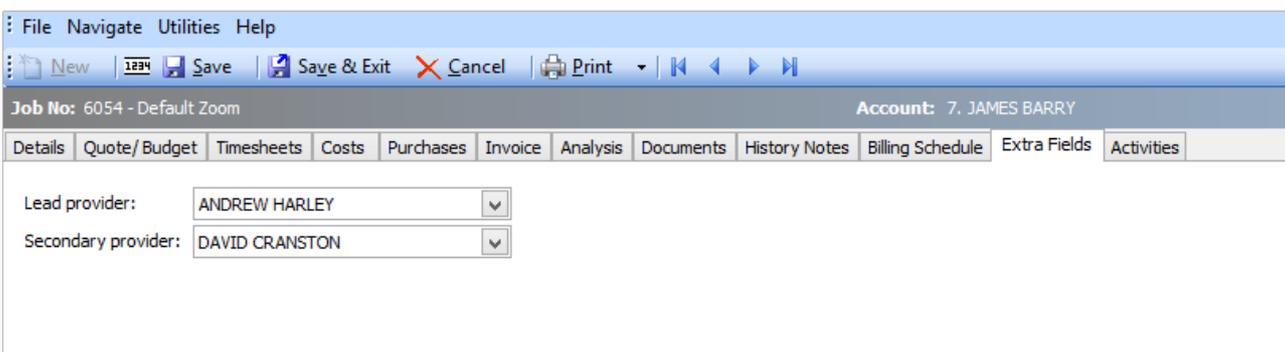


The Drop-Down SQL is this:

`SELECT 0,'NOT SPECIFIED',0 UNION SELECT StaffNo,Name,1 FROM STAFF WHERE IsActive = 'Y' ORDER BY 3,2`

For Secondary Provider the SQL is the same but the extra field is called X_SecondaryProvider.

Once these are set up against the Jobcost Header Table they are visible within MYOB Job Costing against the Job.



Response Levels

TimeTrak [Settings](#) will need to be in place first.

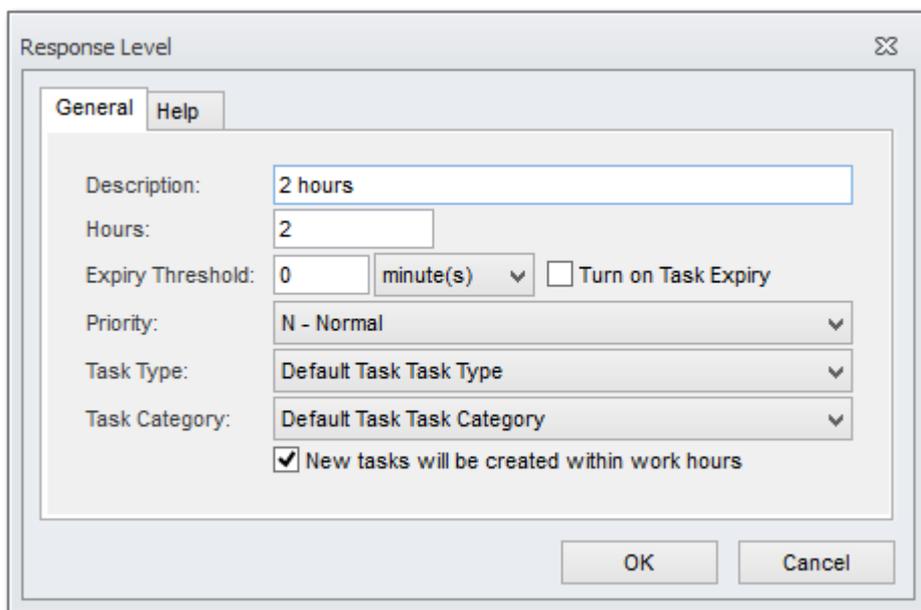
Within TaskTrak Response Levels can be set up against the Debtor Account and against the Job. Then these flow through to the Task so users can see what Response they are expected to respond to.

This setting does require TaskTrak to be installed and set up.

Within the MYOB EXO database there is a table called X_ResponseLevels which is populated from the TimeTrak Admin Console, TaskTrak Setup with the created Response Levels.

The table X_ResponseLevels table will hold this information.

[ID](#), [Description](#), [Hours](#), [Priority](#), [JobType](#), [JobCategory](#), [ExpiryThreshold](#), [EnableTaskExpiry](#), [CreateInWorkHours](#), [Help](#)



The screenshot shows a 'Response Level' dialog box with the following fields and values:

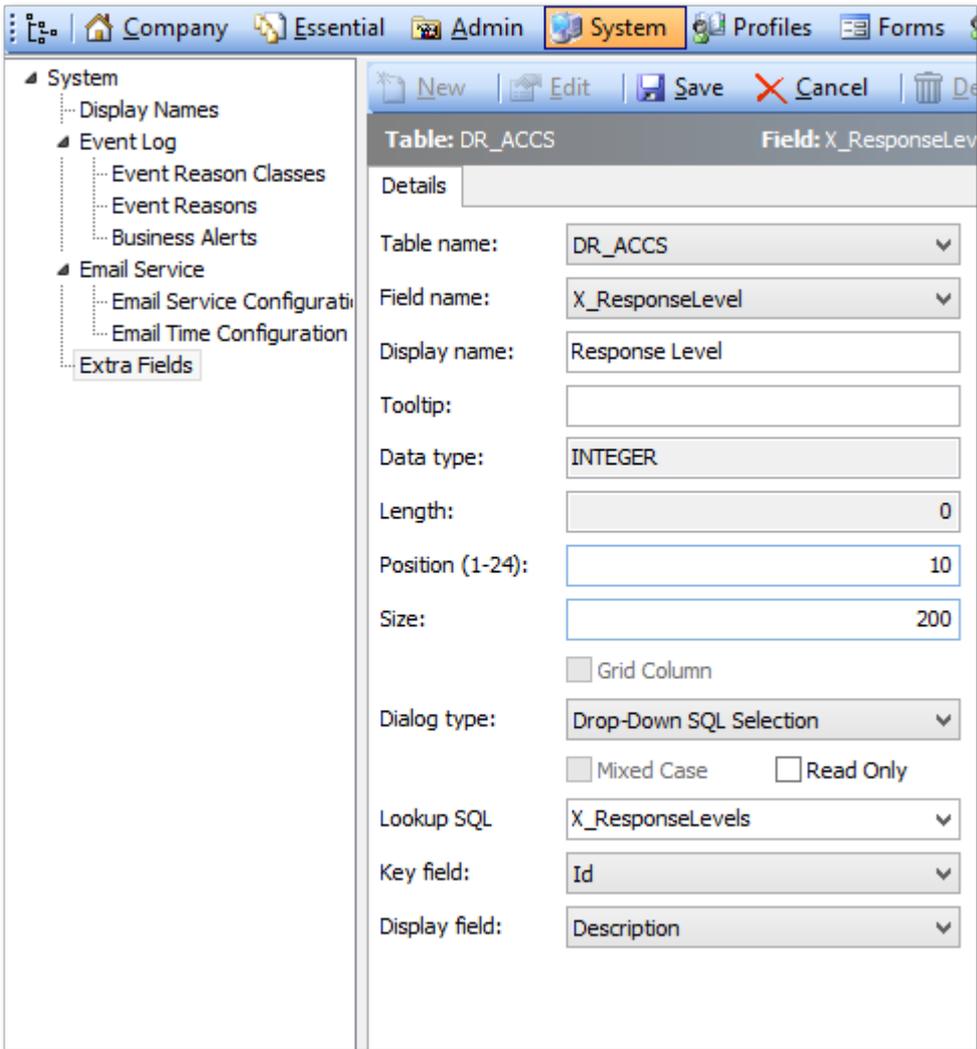
- Description: 2 hours
- Hours: 2
- Expiry Threshold: 0 minute(s) Turn on Task Expiry
- Priority: N - Normal
- Task Type: Default Task Task Type
- Task Category: Default Task Task Category
- New tasks will be created within work hours

Buttons: OK, Cancel

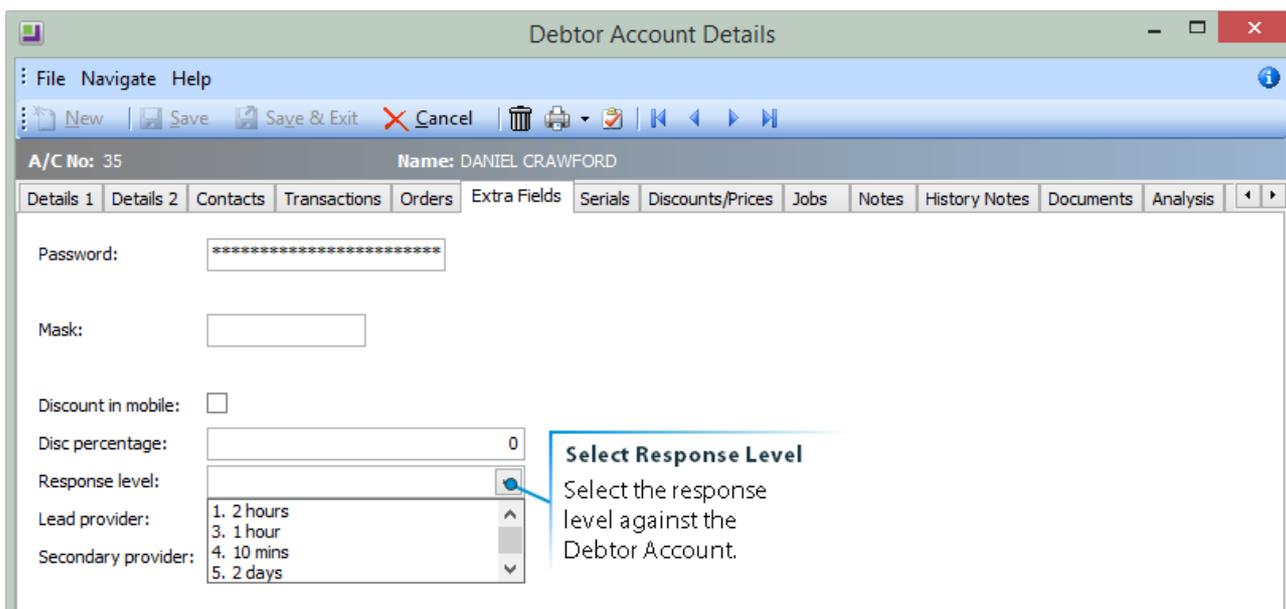
Once these are set up in the TimeTrak Admin Console, the extra fields against the DR_ACCS and JOBCOST_HDR tables can be set up.

The extra fields already exist in the MYOB EXO database.

Within the MYOB EXO Config set up the extra field on the DR_ACCS table called X_ResponseLevel and have a Drop-Down SQL Selection to the X_ResponseLevels Table



Now against the Debtor Account users can select the required Response level. This will pull through into all Tasks within TimeTrak but if a Job has a different response level it will display that.



If the Response Level is to be set up against the Job then within MYOB Config extra fields set up the JOBCOST_HDR table with the X_ResponseLevel field.

The screenshot shows the 'Extra Fields' configuration window in MYOB. The left-hand tree view is expanded to 'System' > 'Email Service' > 'Extra Fields'. The main area is titled 'Table: JOBCOST_HDR' and 'Field: X_ResponseLevel'. It contains the following fields:

- Table name: JOBCOST_HDR
- Field name: X_ResponseLevel
- Display name: Response Level
- Tooltip: (empty)
- Data type: INTEGER
- Length: 0
- Position (1-24): 8
- Size: 200
- Grid Column
- Dialog type: Drop-Down SQL Selection
- Mixed Case Read Only
- Lookup SQL: X_ResponseLevels
- Key field: Id
- Display field: Description

Once this is set up then the Response Level can be set at the Job Level.

The screenshot shows the 'Job Details' window for Job No: 6055 - Pricemart Job. The 'Response level' dropdown is open, showing the following options:

- 1. 2 hours
- 2. 1 hour
- 3. 10 mins
- 4. 2 days

A callout box with the text 'Select Response Level' and 'Select the correct response level for the job.' points to the dropdown menu.

Time Only from a Task

TimeTrak will support the business model where all time against selected jobs must be against a Task in TimeTrak.

This is a useful enforcement where Tasks capture each piece of work against an open ended Job.

When a user tries to create a Time Entry and they select the Job only, then they will be forced to either select an active Task or create a new Task.

This setting flows across both TimeTrak Professional and TimeTrak Mobile.

The extra field already exists in the MYOB EXO database.

The extra field is only for the MYOB EXO Jobcost_hdr table, called X_TT_OnlyFromTask

This field is a tick box on the Job and needs to be set up to look like this:

The screenshot shows the configuration window for a field in the MYOB EXO database. The window title is 'Table: JOBCOST_HDR Field: X_TT_OnlyFromTask'. The left sidebar shows a tree view with 'System' expanded, and 'Extra Fields' > 'Standard Tables' selected. The main area contains the following configuration options:

- Table name: JOBCOST_HDR
- Field name: X_TT_OnlyFromTask
- Display name: Time Only from Task
- Tooltip: (empty)
- Data type: CHARACTER
- Length: 1
- Position (1-24): 2
- Size: 200
- Grid Column
- Dialog type: Check Box
- Mixed Case Read Only
- Lookup SQL: (empty)
- Key field: (empty)
- Display field: (empty)

Once this is enabled, against a Job in MYOB Job Costing tick the Time Only From Task option to enforce that for that Job all time must come via a Task.

Job No: 4045 - 100K SERVICE Account: 24. DOROTHY HEDGES Job Progress OK

Details | Quote/Budget | Timesheets | Costs | Purchases | Invoice | Analysis | Documents | History Notes | Billing Schedule | Extra Fields | Activities

Job details

Code: 4045
 Title: 100K SERVICE
 Status: New Job
 Type: 100,000km Service
 Category: Domestic
 Account: 24. DOROTHY HEDGES
 Campaign Wave:
 Opportunity:

Customer

Job Mgr: Exo Business Admin Account
 Cust O/N:
 Contact:
 Site address:
 Line 1: Dorothy Hedges
 Line 2: 20 Williamson Ave
 Line 3: Grey Lynn
 Line 4: Auckland
 Line 5:
 Line 6:

Dates

Created: 04.08.2015 4:29 p.m.
 Quoted: 00:00
 Start: 00:00
 Due: 00:00
 Complete: 00:00
 Follow Up: 00:00

Branch: 0. AUCKLAND
 WIP Loc: 5. WIP
 Entered: Bridget Fairweather
 Our ref:

Billing Mode: Charge-up

Extra fields
 Template job:
 Time only from task: **Time Only From Task**
 Copy quote lines:
 Task group: Global Group

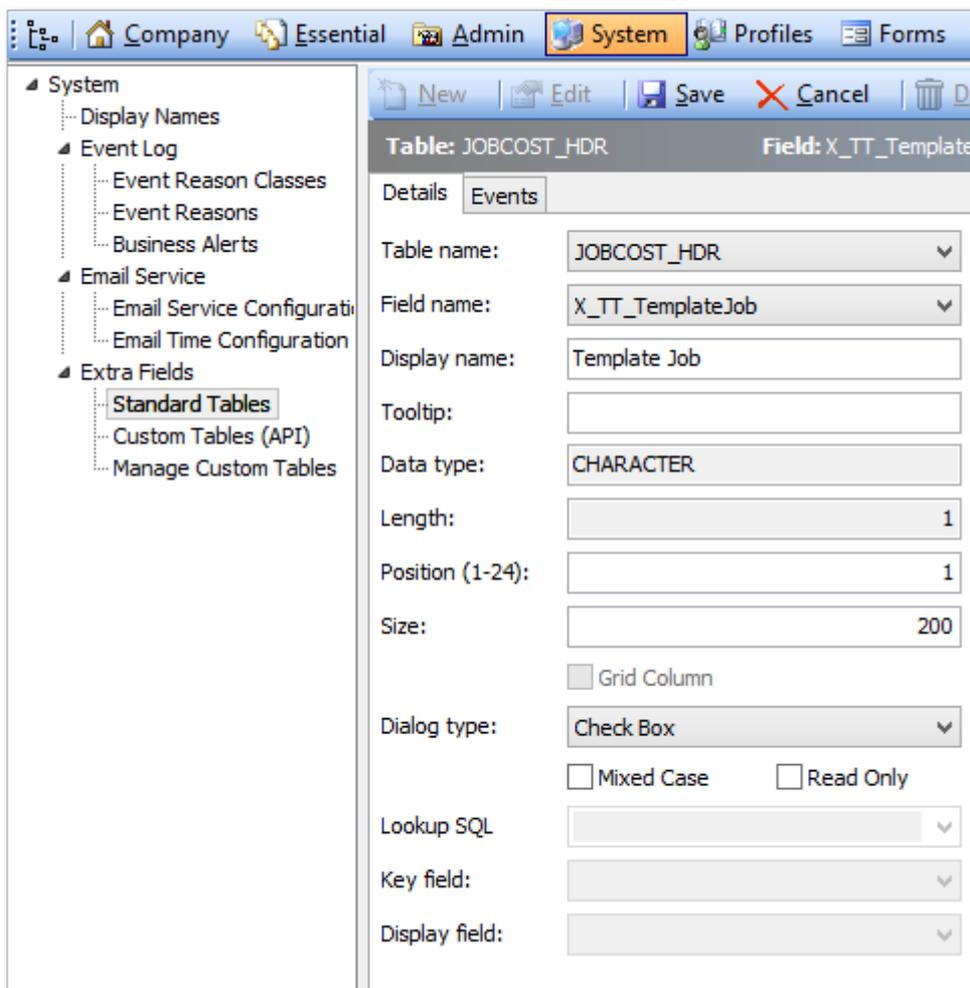
Template Job

TimeTrak Users can be set up with the permission to create new Jobs from within TimeTrak which writes the new jobs immediately into MYOB Job Costing.

These jobs are based upon an existing Job set up in MYOB Job Costing that is identified as a TimeTrak Template Job.

The extra field already exists in the MYOB EXO database.

The extra field is only for the MYOB EXO Jobcost_hdr table, called X_TT_TemplateJob
This field is a tick box on the Job and needs to be set up to look like this:



The screenshot shows the configuration window for a field in the MYOB EXO database. The window title is "Table: JOBCOST_HDR Field: X_TT_TemplateJob". The left sidebar shows a tree view with "System" expanded, and "Extra Fields" selected. The main area shows the configuration for the field "X_TT_TemplateJob" in the "JOBCOST_HDR" table. The configuration includes:

- Table name: JOBCOST_HDR
- Field name: X_TT_TemplateJob
- Display name: Template Job
- Tooltip: (empty)
- Data type: CHARACTER
- Length: 1
- Position (1-24): 1
- Size: 200
- Grid Column
- Dialog type: Check Box
- Mixed Case Read Only
- Lookup SQL: (empty)
- Key field: (empty)
- Display field: (empty)

Template Jobs should be set up against a dummy Debtor account.

There can be any number of templates to match the types of jobs that are routinely created in MYOB Job Costing.

Job No: TEMP1 - TEMPLATE1 Account: 0. CASH SALES Job Progress OK

Details Quote/Budget Timesheets Costs Purchases Invoice Analysis Documents History Notes Billing Schedule Extra Fields Activities

Job details

Code: TEMP1

Title: TEMPLATE1

Status: New Job

Type: Minor Service

Category: Domestic

Account: 0. CASH SALES

Campaign Wave:

Opportunity:

Customer

Job Mgr: Exo Business Admin Account

Cust O/N:

Contact:

Site address:

Line 1:

Line 2:

Line 3:

Line 4:

Line 5:

Line 6:

Dates

Created: 12.08.2015 2:27 p.m.

Quoted: 00:00

Start: 00:00

Due: 00:00

Complete: 00:00

Follow Up: 12.08.2015 14:27

Branch: 0. AUCKLAND

WIP Loc: 5. WIP

Entered: Exo Business Admin Account

Billing Mode: Charge-up

Extra fields

Template job:

Time only from task:

Template Job
Tick this option against a Template Job so TimeTrak can pick this up.

Copy Quote Lines

This setting works in conjunction with Job Templates.

If Copy Quote Lines is enabled then when a new job is created within TimeTrak, then the new Job will have all the Quote/Budget Lines that were set against the template job.

The extra field already exists in the MYOB EXO database.

The extra field is only for the MYOB EXO Jobcost_hdr table, called X_TT_CopyQuoteLines

This field is a tick box on the Job and needs to be set up to look like this:

The screenshot shows the configuration window for a field in the MYOB EXO database. The window title is 'Table: JOBCOST_HDR Field: X_TT_CopyQuoteLines'. The left pane shows a tree view with 'System' expanded, and 'Extra Fields' selected. The right pane shows the configuration details for the field:

Table name:	JOBCOST_HDR
Field name:	X_TT_CopyQuoteLines
Display name:	Copy Quote Lines
Tooltip:	
Data type:	CHARACTER
Length:	1
Position (1-24):	4
Size:	200
<input type="checkbox"/> Grid Column	
Dialog type:	Check Box
<input type="checkbox"/> Mixed Case	<input type="checkbox"/> Read Only
Lookup SQL:	
Key field:	
Display field:	

The Job will need both the Template Job Option and the Copy Quote Lines option ticked on to create a new job from TimeTrak with quote lines.

Job No: 1033 - TEMPLATE2 Account: 7. JAMES BARRY Job Progress OK

Details Quote/Budget Timesheets Costs Purchases Invoice Analysis Documents History Notes Billing Schedule Activities

Job details

Code: 1033
 Title: TEMPLATE2
 Status: New Job
 Type: Major Service
 Category: Commercial
 Account: 7. JAMES BARRY
 Campaign Wave:
 Opportunity:

Customer

Job Mgr: Bridget Fairweather
 Cust O/N: 1234567890123456789012345678
 Contact: 9. JAMES BARRY
 Site address:
 Line 1: 29 WHITES WAY
 Line 2: KELBURN
 Line 3: WELLINGTON
 Line 4: NEW ZEALAND
 Line 5:
 Line 6:

Dates

Created: 22.08.2015 3:07 p.m.
 Quoted: 00:00
 Start: 00:00
 Due: 00:00
 Complete: 00:00
 Follow Up: 22.08.2015 15:05

Branch: 1. WELLINGTON
 WIP Loc: 5. WIP
 Entered: Greg Manning

Billing Mode: Charge-up

Extra fields
 Template job:
 Copy quote lines:
 Time only from task:

Copy Quote Lines

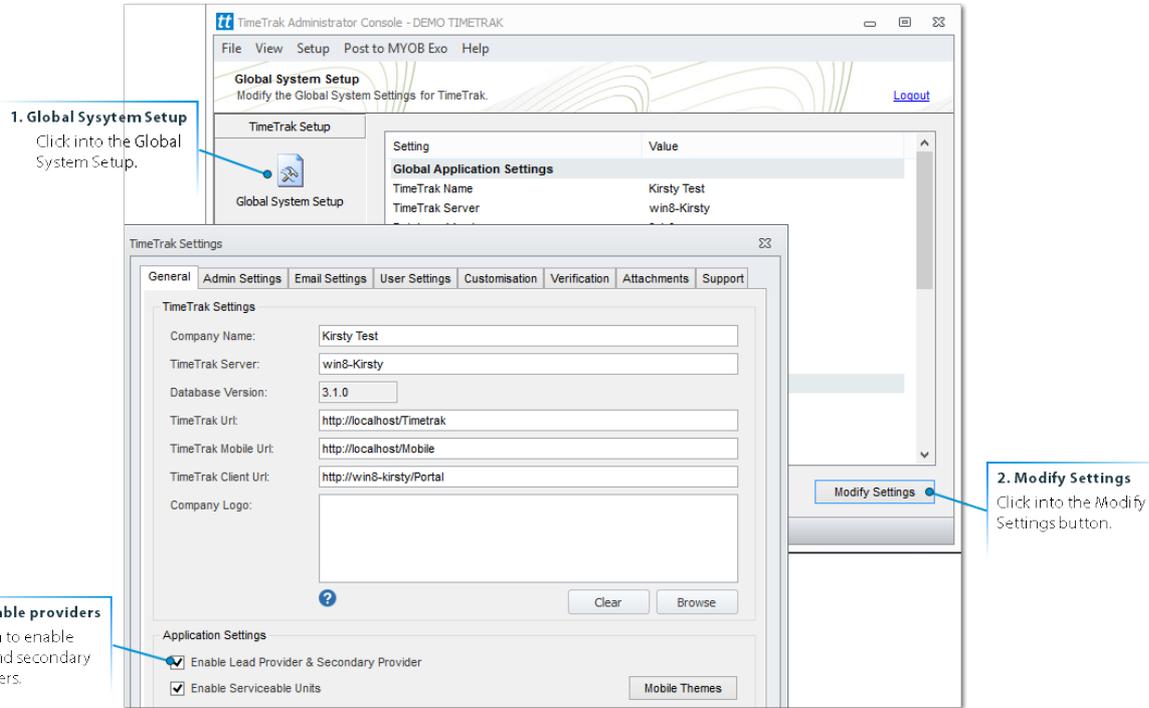
TimeTrak Extra Field Setup

This part of the document will cover the set up of TimeTrak so the extra functionality will work properly.

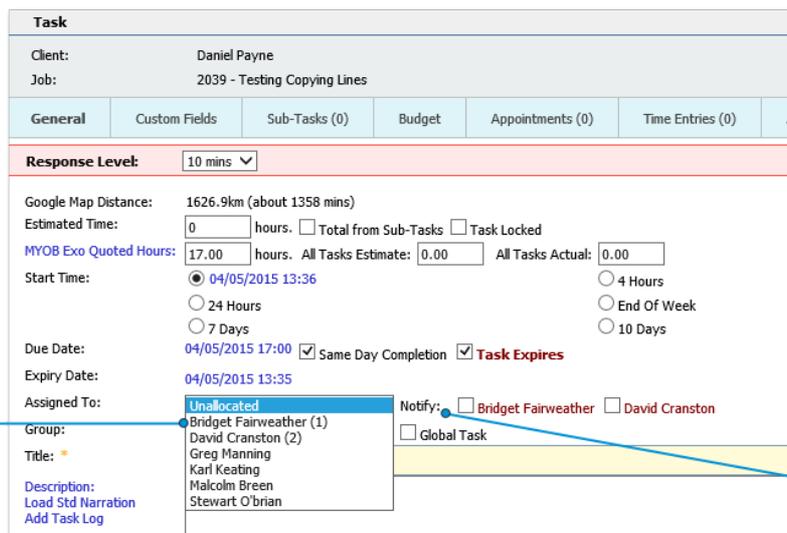
Lead and Secondary Providers

To enable Lead and Secondary Providers log into the TimeTrak Admin Console.

1. Click into the Global System Setup
2. Click on the Modify Settings button
3. Enable Lead Provider and Secondary Provider



Once this is ticked on TimeTrak will pick up the assigned Lead and Secondary providers set up against the MYOB Debtor account and/ or MYOB Job and allow Tasks to be assigned to the set Providers.

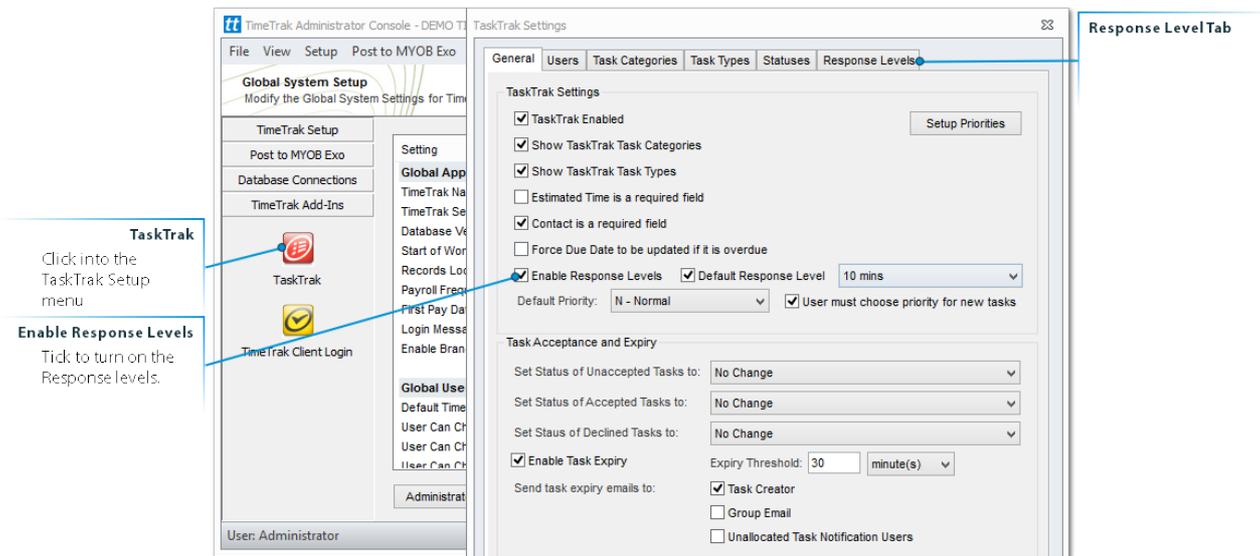


Response Levels

Before you can get the extra fields in MYOB EXO to work, the Response Levels need to be set up in the TaskTrak Setup within the TimeTrak Admin Console.

Within the TaskTrak General Settings tick to enable Response Levels.

The Response Levels Tab will become available.



Click into the Response Levels Tab to create the new levels.

Please keep in mind the levels are organised in the order they are entered.

Click Add to create a new Response Level.

Enter in the Description, Hours, Priority, Task Type, Task Category, Expiry Threshold, Turn on Task Expiry, Create In Work Hours and Help .

Response Level

General Help

Description: 2 hours

Hours: 2

Expiry Threshold: 0 minute(s) Turn on Task Expiry

Priority: N - Normal

Task Type: Default Task Task Type

Task Category: Default Task Task Category

New tasks will be created within work hours

OK Cancel

When entering a Time Entry in TimeTrak Professional, users will see a notification.

New Time Entry

Time Entry | Job Billing Summary | Assign to another Task | Reassign Time Entry | 1,400%

Client: D & C Panelbeaters [View Client](#)

Job: 3045 - Minor Service - Ou789 [View Job](#)

Task: Minor Service OU789 [Add Task Log](#) | [View Task](#)

General Activity

Response Level: ASAP

Start Time: 14/08/2015 11:20 a.m. Fill Day Split Over Entries

End Time: 14/08/2015 1:00 p.m. Minutes: 100.00 Split Over Breaks

Status: Billable

User: Bridget Fairweather

Labour Code: Standard Labour Charge (LABOUR)

Cost Group: None

Cost Type: None

Rate: Internet: \$45.00 Other Rate Travel

Users will also see the same type of notification when creating a task.

During the client selection

Create New Task

Client: Search [Client Location](#) [Client Details](#)

Dorothy Hedges (DORHED01)

Jobs for Dorothy Hedges Search [Add Job](#)

All Jobs for Dorothy Hedges

Response Level: 1-2 Days

Create Task

As well as in the Task Creation screen itself.

Task										Client Task Summary Back
Client:		Dorothy Hedges							View Client	
Job:		31 - Serviceableunittest							View Job	
General	Sub-Tasks (0)	Budget	Appointments (0)	Time Entries (0)	Attachments (0)	Activity (0)	Notes	Recurrence	Serviceable Units (0)	
Response Level: 1-2 Days										
Google Map Distance:		1641.6km (about 1363 mins)								Get Directions
Estimated Time:		0 hours		<input type="checkbox"/> Total from Sub-Tasks		<input type="checkbox"/> Task Locked				
Start Time:		<input checked="" type="radio"/> 16/08/2015 11:20			<input type="radio"/> 4 Hours		<input type="radio"/> Tomorrow			
		<input type="radio"/> 24 Hours			<input type="radio"/> End Of Week		<input type="radio"/> Next Week			
		<input type="radio"/> 7 Days			<input type="radio"/> 10 Days		<input type="radio"/> 14 Days			
Due Date:		16/08/2015 17:00		<input checked="" type="checkbox"/> Same Day Completion		<input type="checkbox"/> Task Expires		<input type="button" value="Jump to..."/> <input type="text" value=""/>		
Assigned To:		<input type="text" value="Bridget Fairweather"/>								
Group:		<input type="text" value="Administrators"/>								
Title:		<input type="text" value=""/>								

Time Only from a Task

When creating a Time Entry against a MYOB Job that has 'Time Only From Task' ticked on then the user will be forced to either create a task or select an existing Task. These settings will flow through both TimeTrak Professional and TimeTrak Mobile.

In the Time Entry Creation screen on selecting the job and clicking go, the next screen will be the Task Creation Screen.

New Time Entry ⌵

Create New Time Entry Friday, 14 August 2015 - 14:00 to 15:40

Client: [Client Location](#)
[Client Details](#)

Dorothy Hedges (DORHED01) ▼

Jobs for Dorothy Hedges: [Job Location](#)
[Add Job](#) [Job Details](#)

4045 - 100K Service ▼

100k Service for the TR546

Go
After selecting the Job, Click on Go

The next screen is the Task Creation Screen

Task

Client: Dorothy Hedges
Job: 4045 - 100K Service

General	Sub-Tasks (0)	Budget	Appointments (0)	Time Entries (0)	Attachments (0)	Activity (0)	Notes	Recurrence	Serviceable Units (0)
---------	---------------	--------	------------------	------------------	-----------------	--------------	-------	------------	-----------------------

Response Level: 1-2 Days

Google Map Distance: 1641.6km (about 1363 mins)

Estimated Time: hours. Total from Sub-Tasks Task Locked

MYOB Exo Quoted Hours: hours. All Tasks Estimate: All Tasks Actual:

Start Time: 14/08/2015 14:00 4 Hours Tomorrow
 24 Hours End Of Week Next Week
 7 Days 10 Days 14 Days

Due Date: 14/08/2015 15:40 Same Day Completion Task Expires

Assigned To: ▼

Group: ▼

Title: *

Description:
[Load Std Narration](#)
[Add Task Log](#)

Client Contact: ▼

Priority: ▼

Task Type: ▼

Task Category: ▼

Template Job

Within both TimeTrak Professional and TimeTrak Mobile a user can be set up with the Profile permission to 'Add a Job', and this will allow that user to create new jobs that write back immediately to MYOB Job Costing.

To be able to create a Job, TimeTrak needs to be able to pick up a template which is set up in MYOB Job Costing.

In TimeTrak Professional the screen will look like this:

Template Selection
Select the correct Template for the type of Job to be created.

Client:	James Barry	Quoted:	
Template:	Template1	Start:	
Job Code:	Template1	Due:	
Title:	Template2	Complete:	
Description:	Template1	Follow Up:	
Customer Order No.:		Site Address:	29 Whites Way
Job Manager:	Exo Business Admin Account		Kelburn
Job Manager Email:	exoadmin@example.com		Wellington
Status:	New Job		New Zealand
Type:	Minor Service		
Category:	Domestic		
Contact:	None		
Branch:	Auckland		
Response Level:	None		

Save Save & Create Task Cancel

And in TimeTrak Mobile it will look like this:

← Back ☰ Menu Add Job ★ 🏠 Home

Add Job ⋮

Client: EDWARD JONES

Template: ⊙

Job Code:

Title:

Order No:

Description:

Notes:

Template Selection
Select the correct template for the type of job to be created.

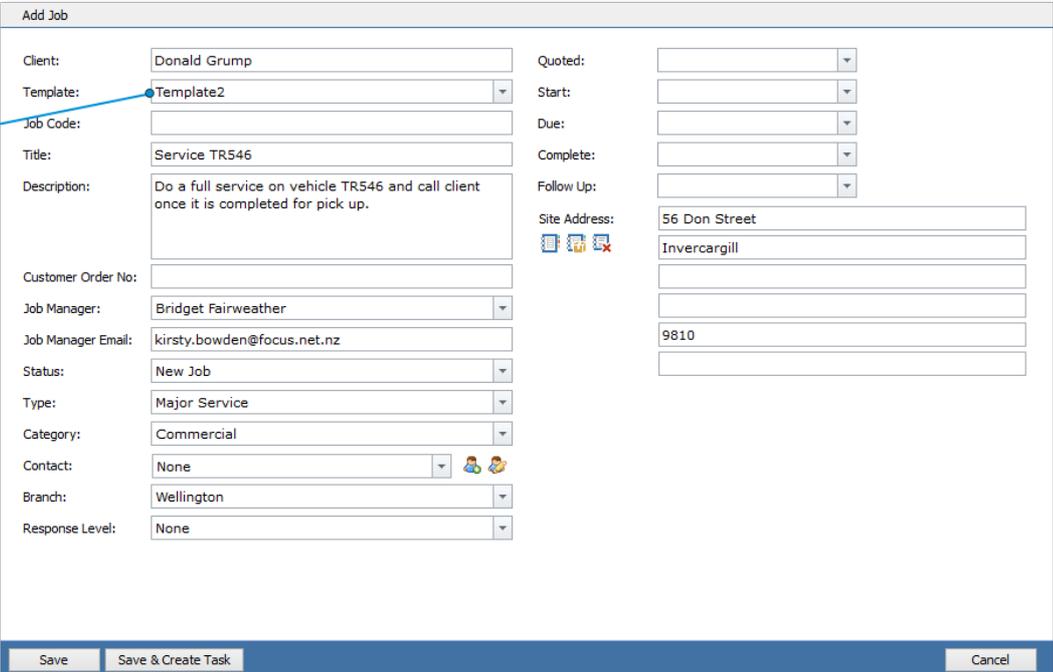
The newly created Job will have the same field values as the selected template.

Copy Quote Lines

When creating a Job within TimeTrak Professional or Mobile and the template job in MYOB Job Costing as Copy Quote Lines ticked on then the job is created with the templates quote lines.

Create a Job based on a template with Copy Quote Lines enabled.

Template Selection



Client:	Donald Grump	Quoted:	
Template:	Template2	Start:	
Job Code:		Due:	
Title:	Service TR546	Complete:	
Description:	Do a full service on vehicle TR546 and call client once it is completed for pick up.	Follow Up:	
Customer Order No:		Site Address:	56 Don Street
Job Manager:	Bridget Fairweather		Invercargill
Job Manager Email:	kirsty.bowden@focus.net.nz		
Status:	New Job		9810
Type:	Major Service		
Category:	Commercial		
Contact:	None		
Branch:	Wellington		
Response Level:	None		

Save Save & Create Task Cancel

Open the Job and go to the Tasks Tab.

If any quote lines have the 'Copy to' value set to 'T' in the MYOB Job then the Manage Tasks button will be visible.

5045: Service TR546 | [Job Billing Summary](#) | [Detailed Job Report](#) | [Client Task Summary](#)

Job Details	Sub Jobs (0)	Financial Summary	Extra Fields	Tasks (0)	Appointments (0)	Serviceable Units (9)
-------------	--------------	-------------------	--------------	------------------	------------------	-----------------------

Tasks Include C

There were no tasks found.
There are 0 closed tasks.

Manage Tasks
Any MYOB Job
Quote Lines with
the 'Copy To' column
set to 'T' will be
visible.

| [Master Job](#) | [Sub Jobs](#) | [Job History Notes](#) | [Job Notes](#) |
| [Invoice On Job](#) | [Job Site Location](#) | [Get Directions](#) |

From within the Manage Tasks screen, any quote lines set with the **'Copy To'** column as **'T'** can be converted into a Task against the job.

Please see the [TaskTrak Help Files](#) for more information about [Manage Tasks](#).

<input type="checkbox"/>	Title	Estimate	Task Description	Due Date	Assigned To	Group	Contact	Priority	Type	Category	Status	Billable Sta		Sub-Tasks	Locked
<input type="checkbox"/>	STANDARD LABOUR CHARGE	4		19/08/2019	Unallocate	Administra	No Contact	Normal	General	General	Not Started	Billable		0	x
4.00															
Add Task Save Changes Cancel changes															