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**
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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.

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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:

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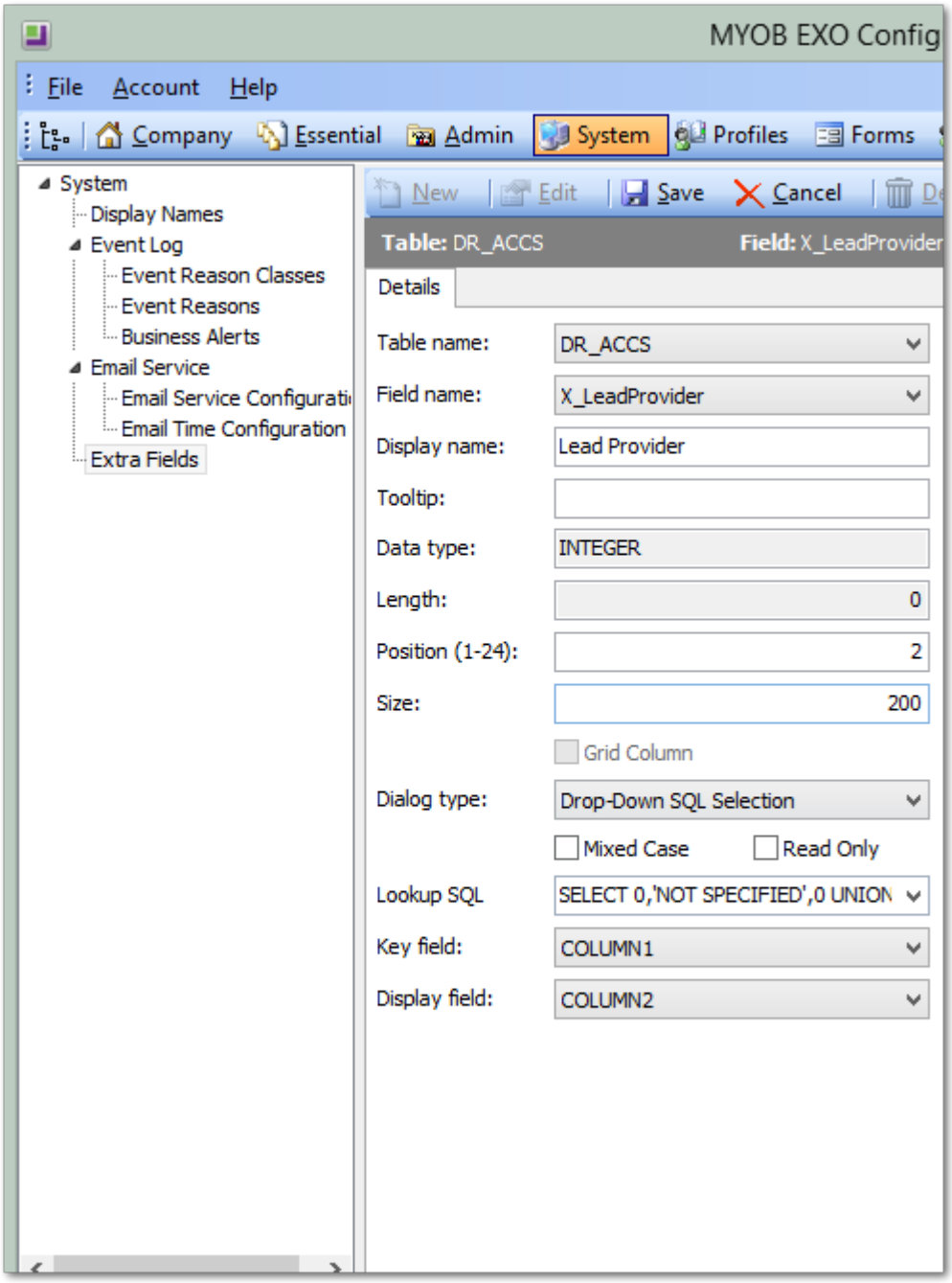

The Drop-Down SQL is this:

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.

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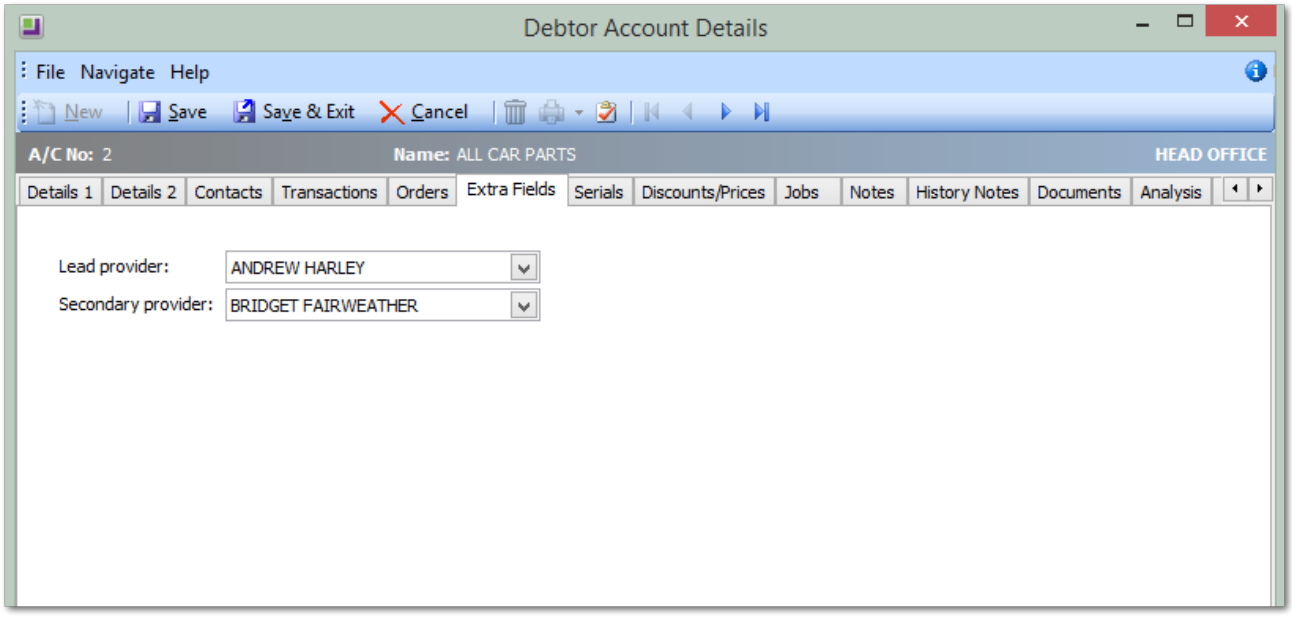

For the Lead and Secondary Provider to be set up on the Job, in the Jobcost_hdr table users will need to set up the two extra fields within the MYOB EXO Configuration Module.

The extra fields already exist in the MYOB EXO database.

They should look like this:

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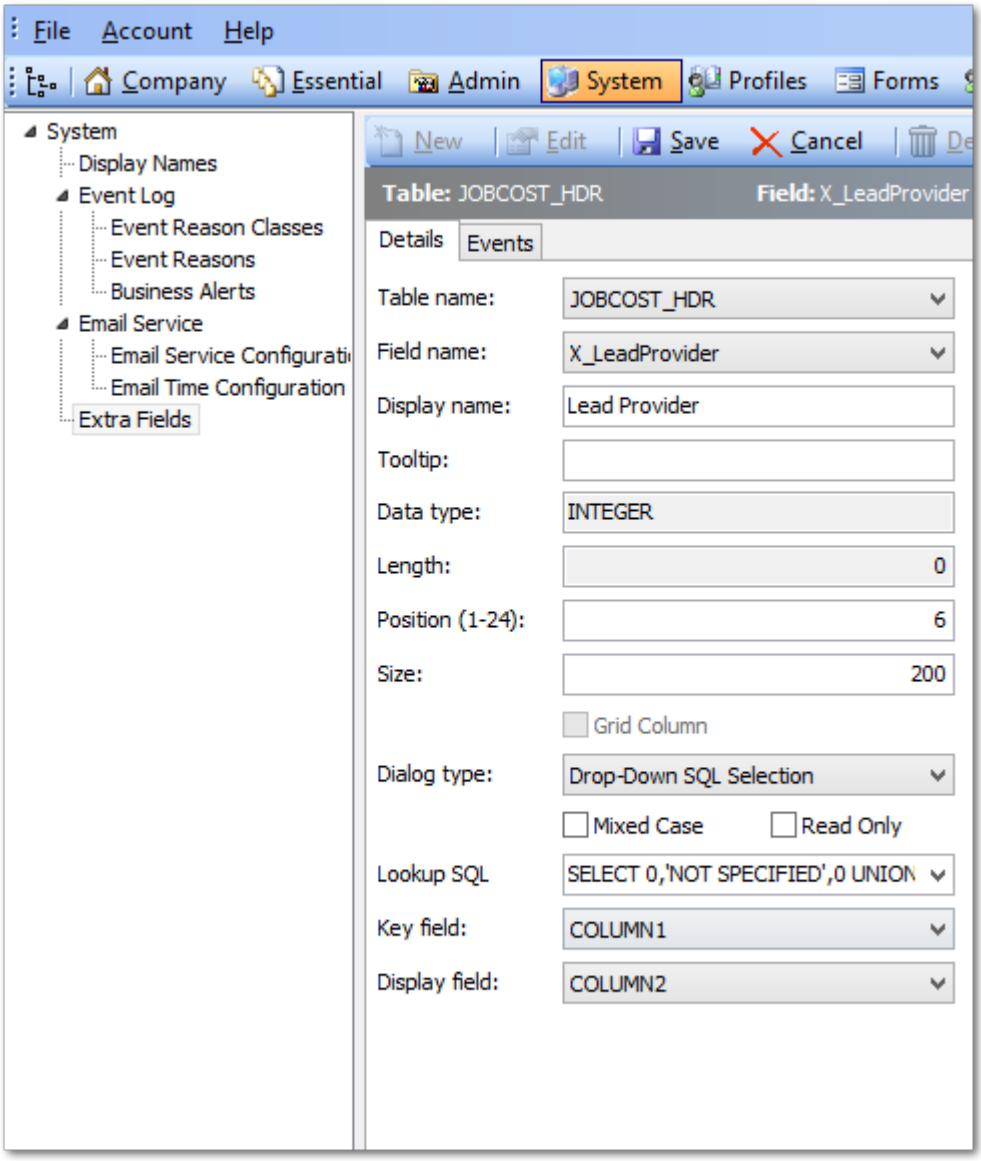
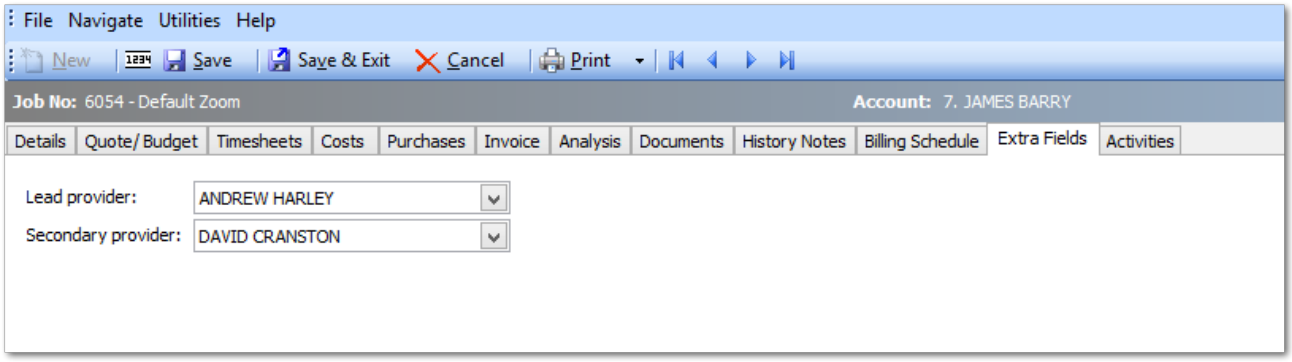


The Drop-Down SQL is this:

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.



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Response Levels

TimeTrak Settings will need to be in place first.

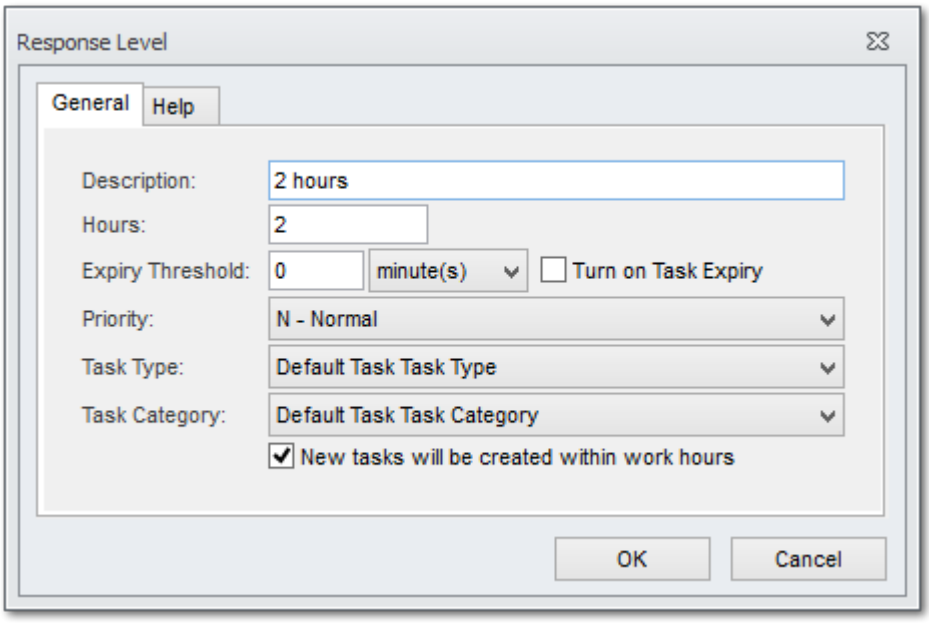
Within TaskTrak Response Levels can be set up against the Debtor Account and against the Job. Then these flow through to the Task so users can see what Response they are expected to respond to.

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



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

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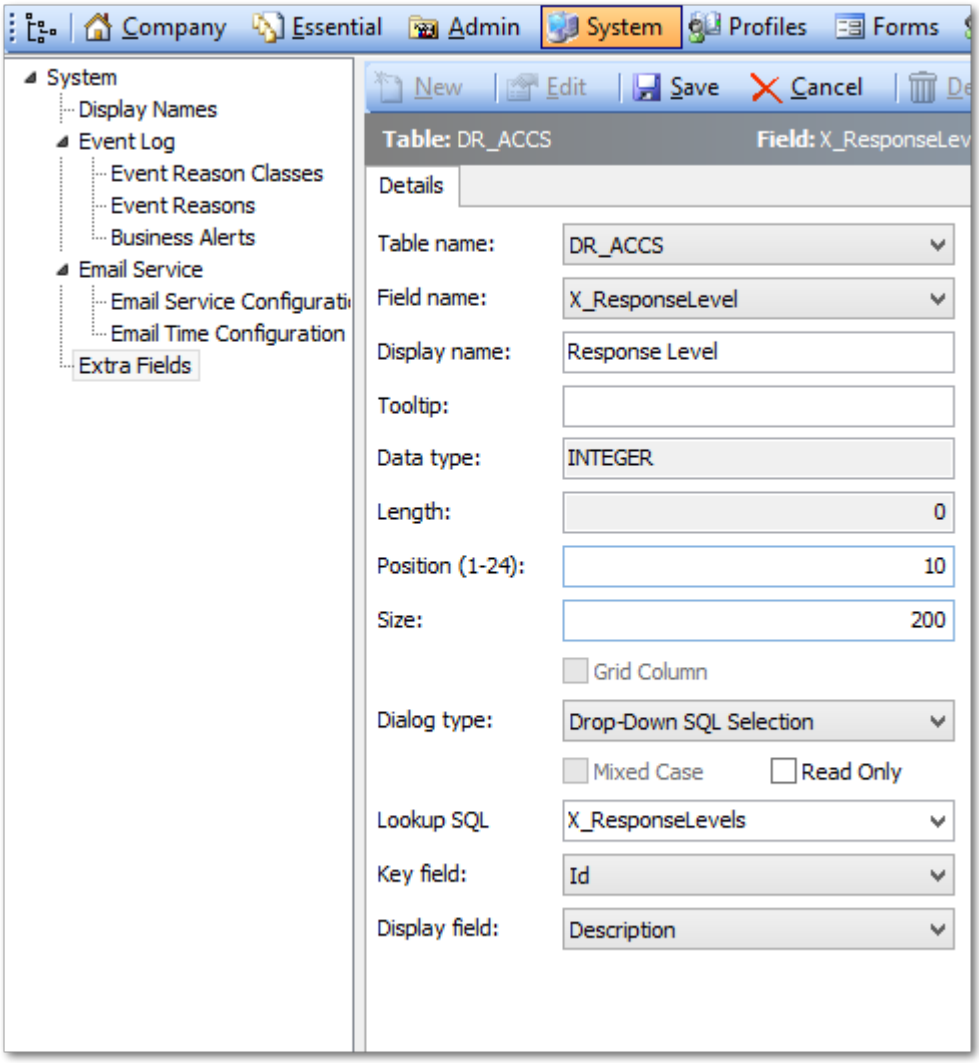
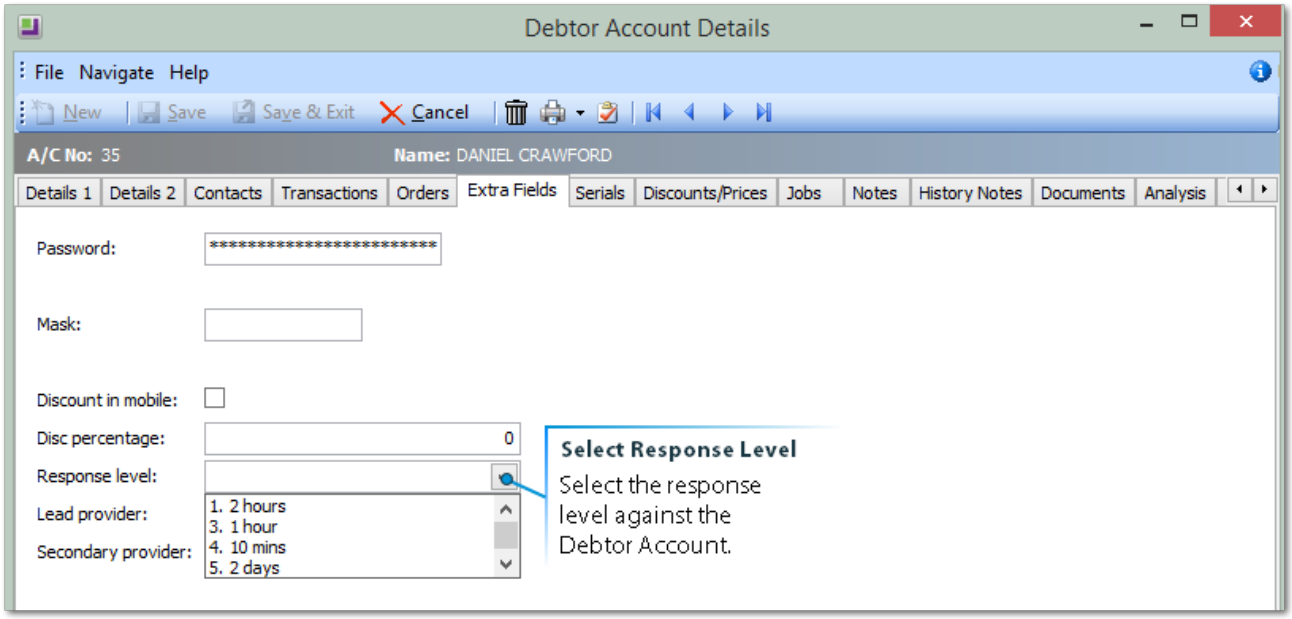


Now against the Debtor Account users can select the required Response level.
This will pull through into all Tasks within TimeTrak but if a Job has a different response level it will display that.



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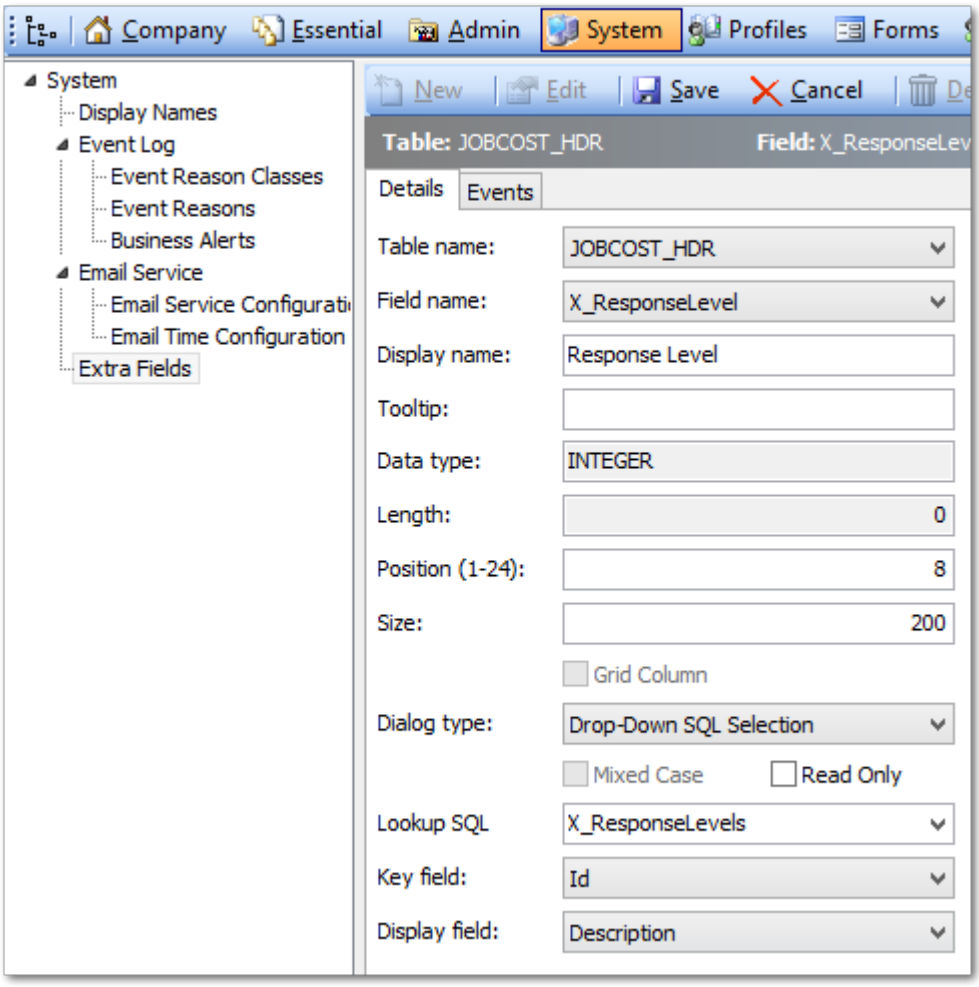
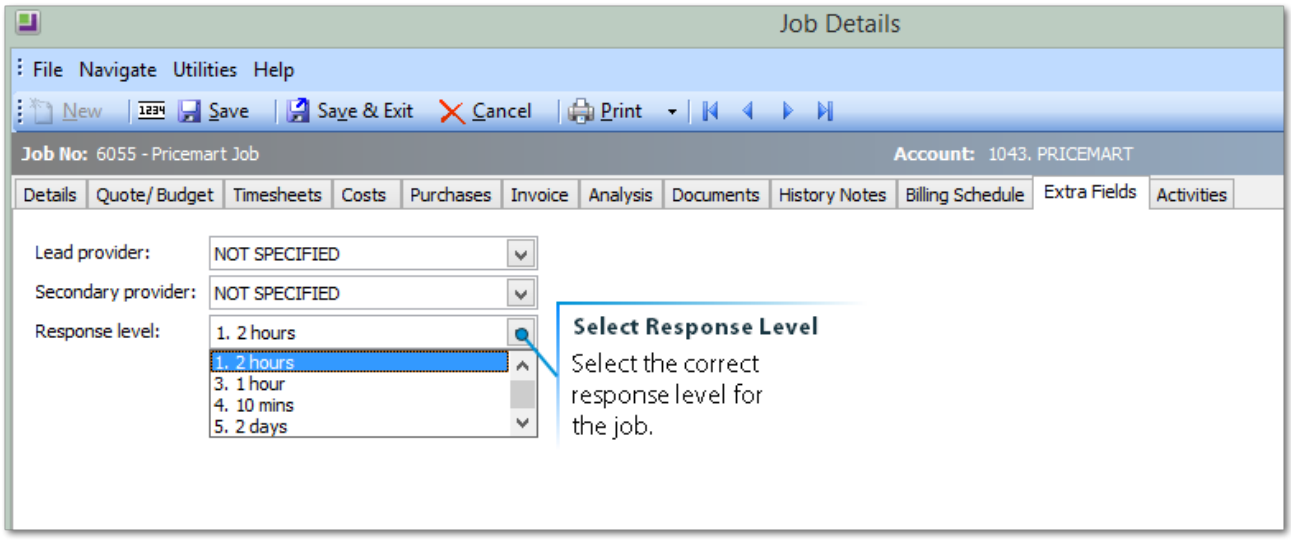
If the Response Level is to be set up against the Job then within MYOB Config extra fields set up the JOBCOST_HDR table with the X_ResponseLevel field.



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



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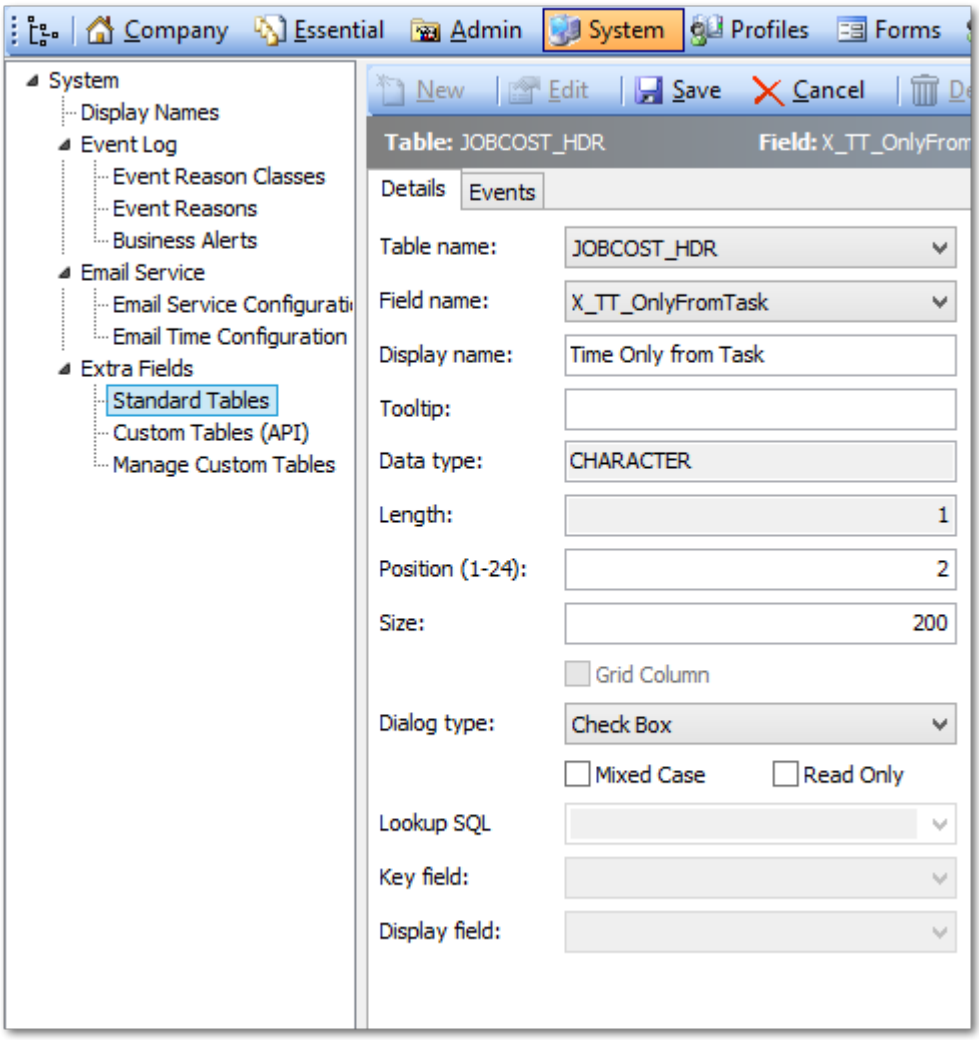
Time Only from a Task

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:



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.

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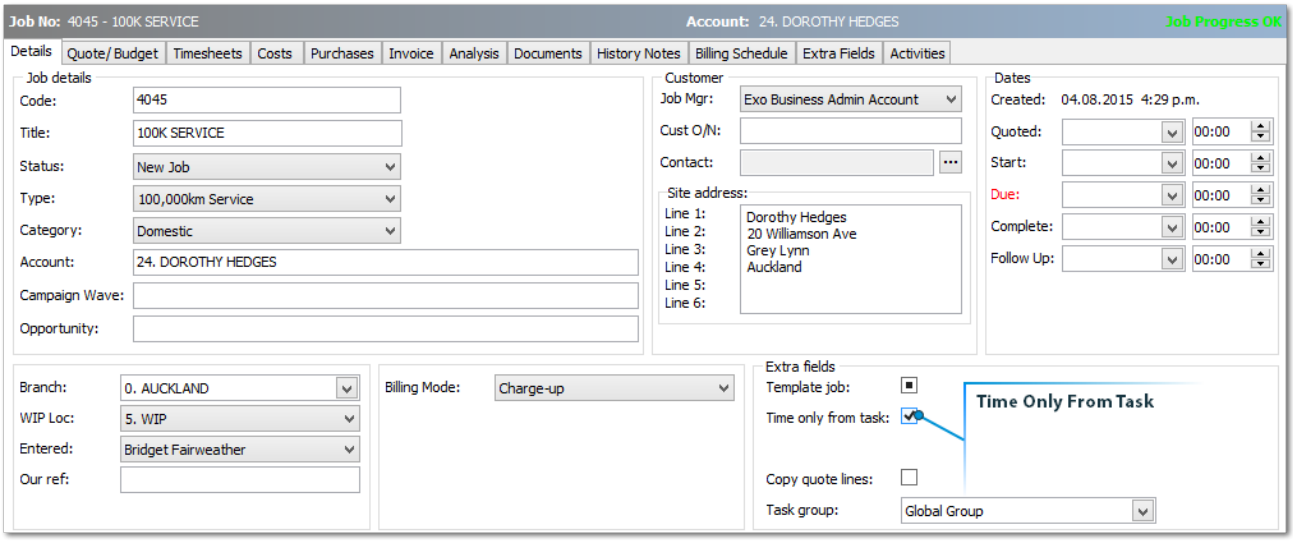

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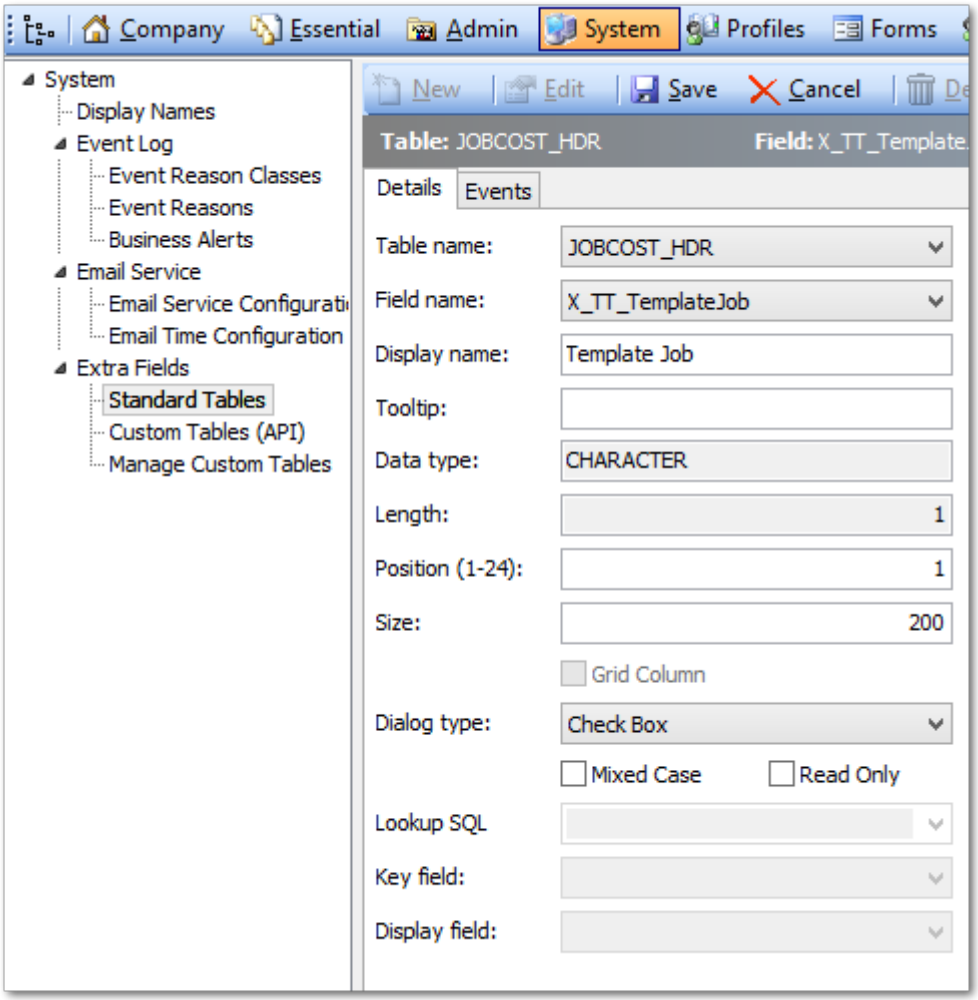
Template Job

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:



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.

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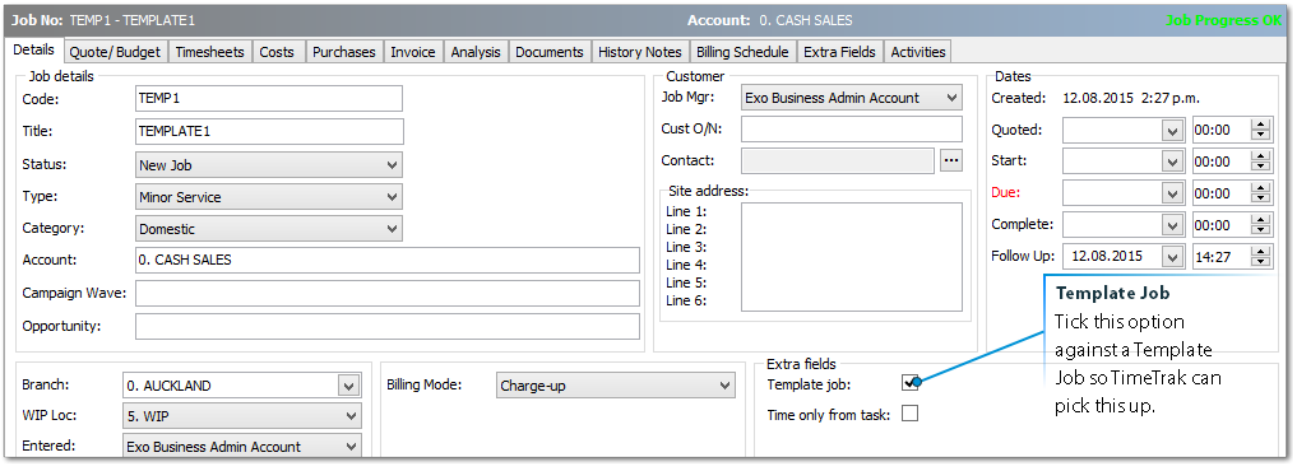

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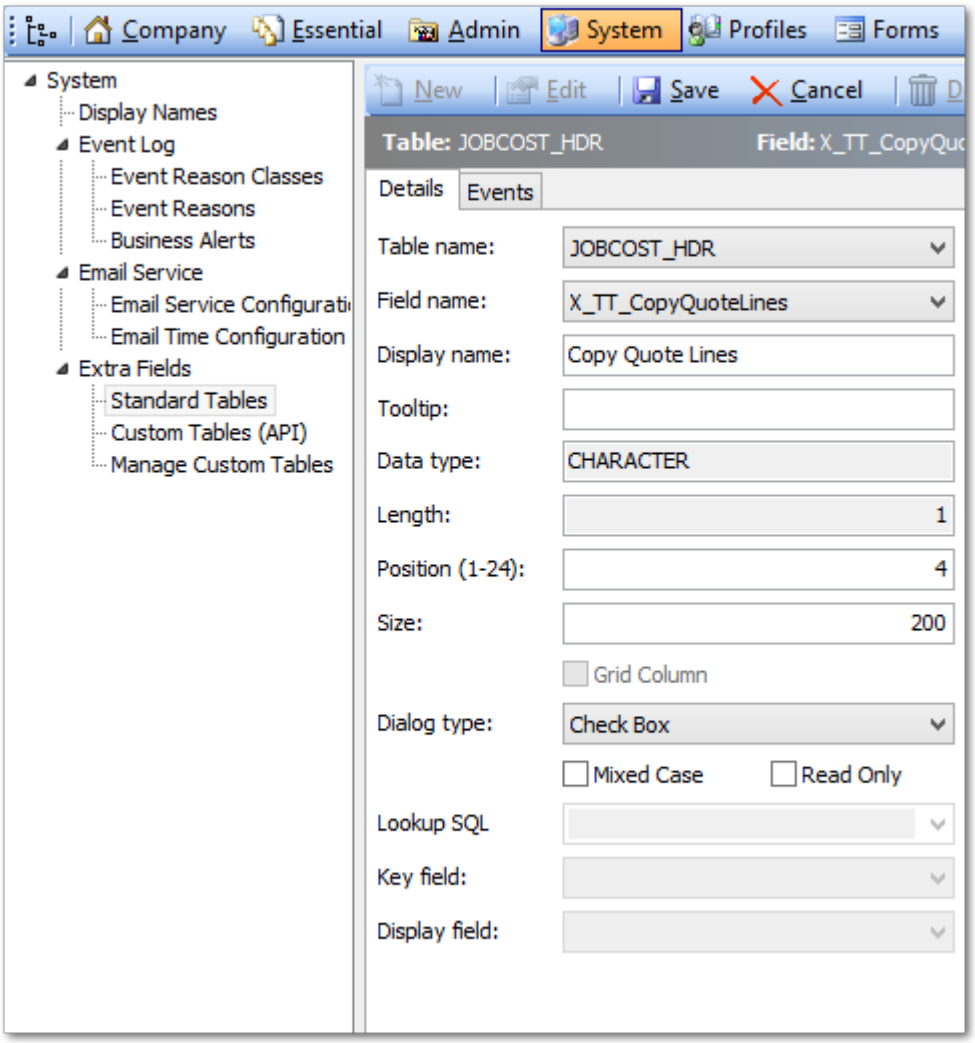
Copy Quote Lines

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 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.

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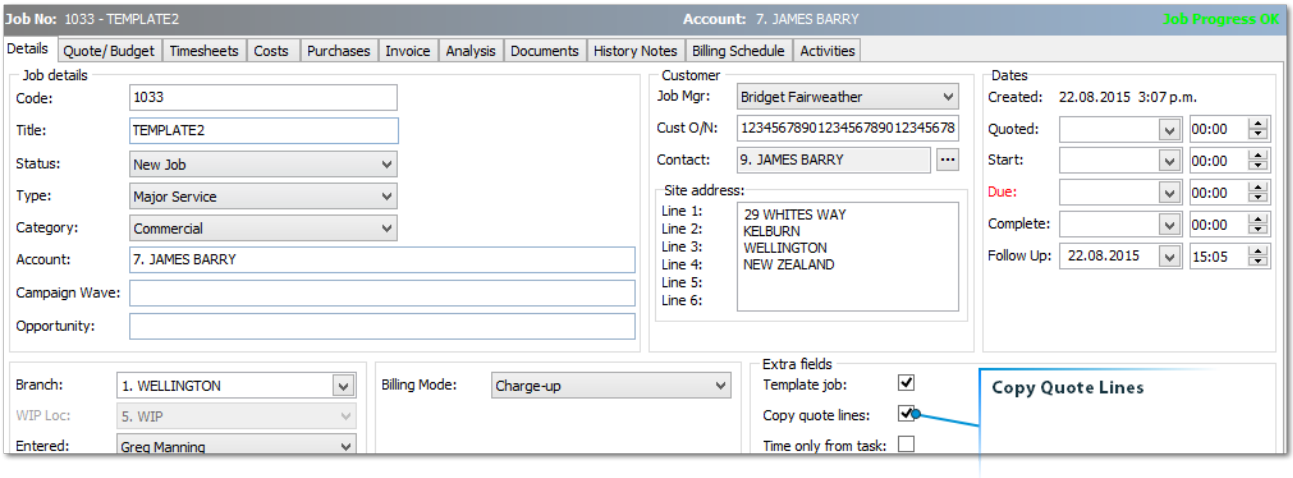

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TimeTrak Extra Field Setup

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

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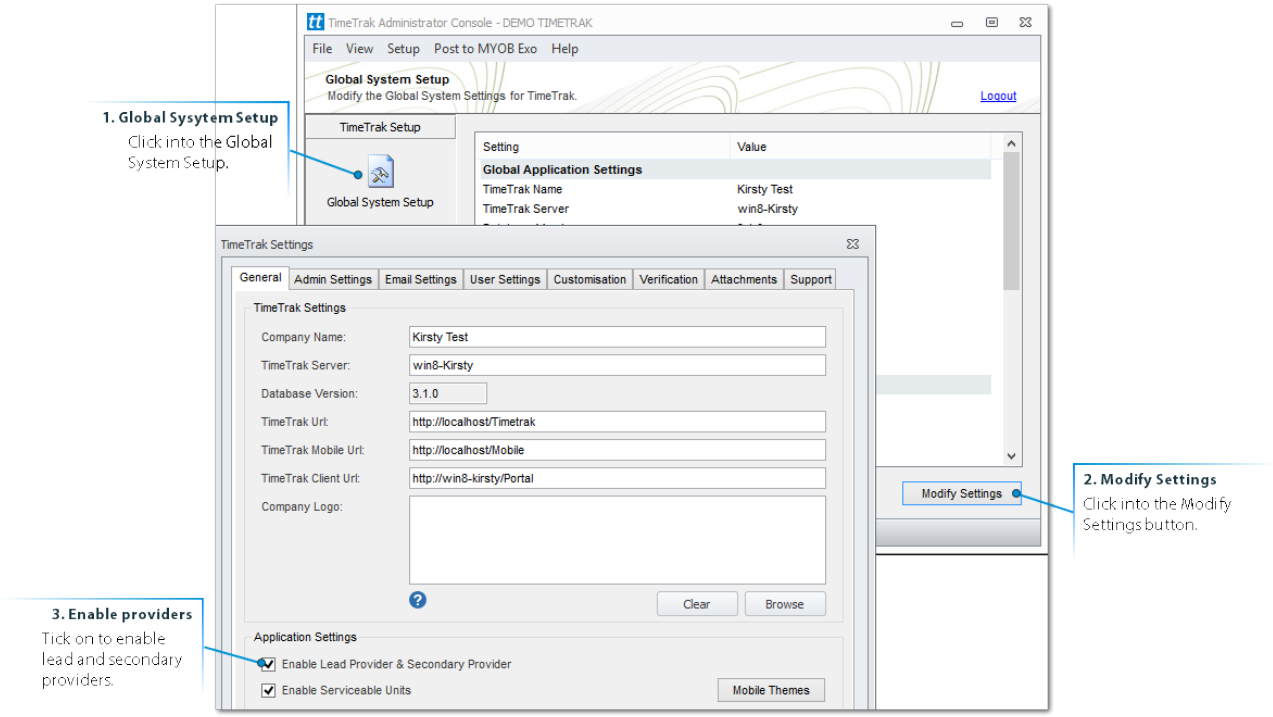
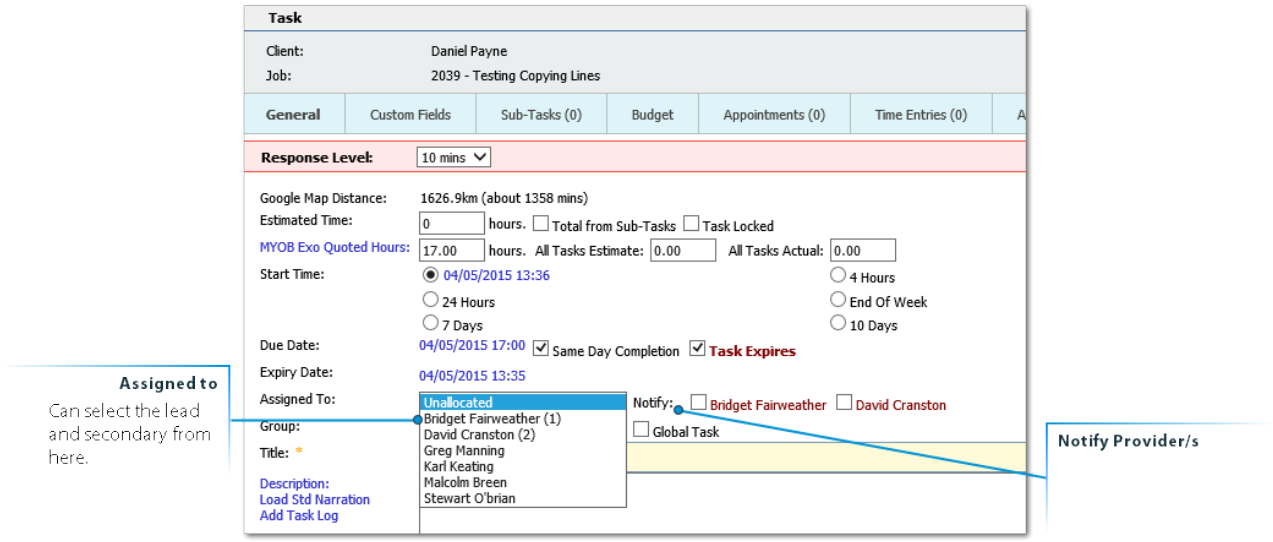
Lead and Secondary Providers

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.



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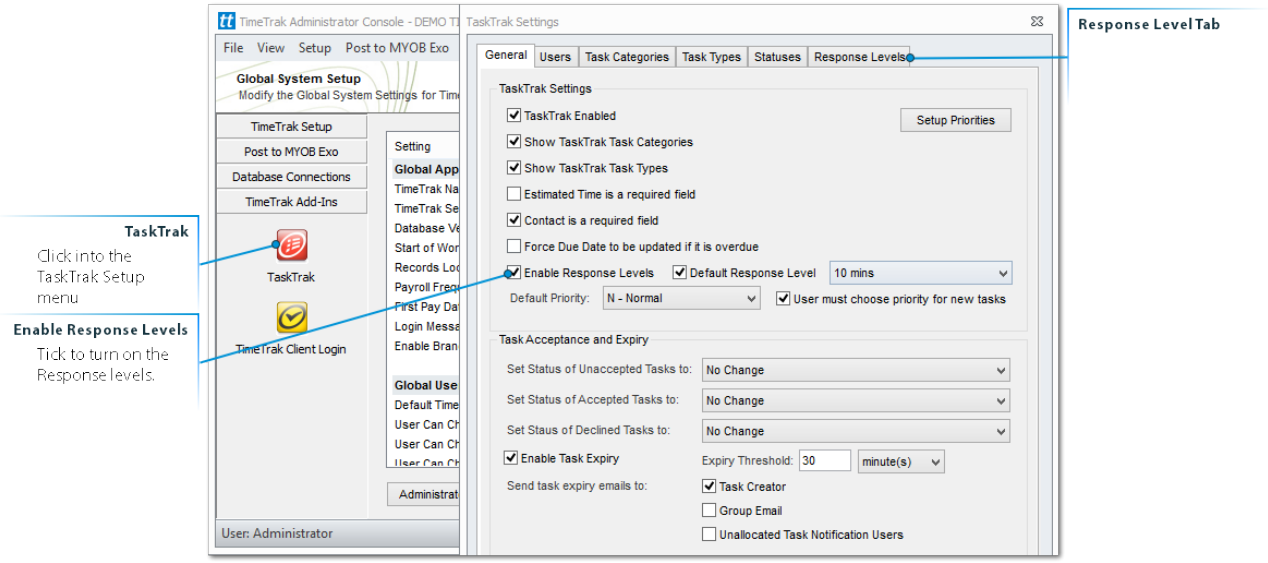
Response Levels

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 .

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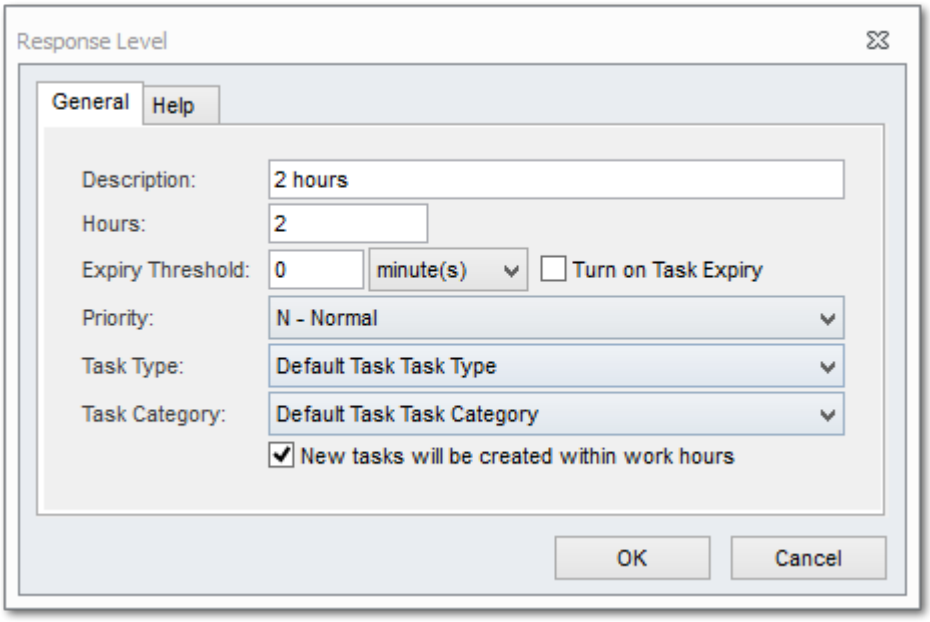
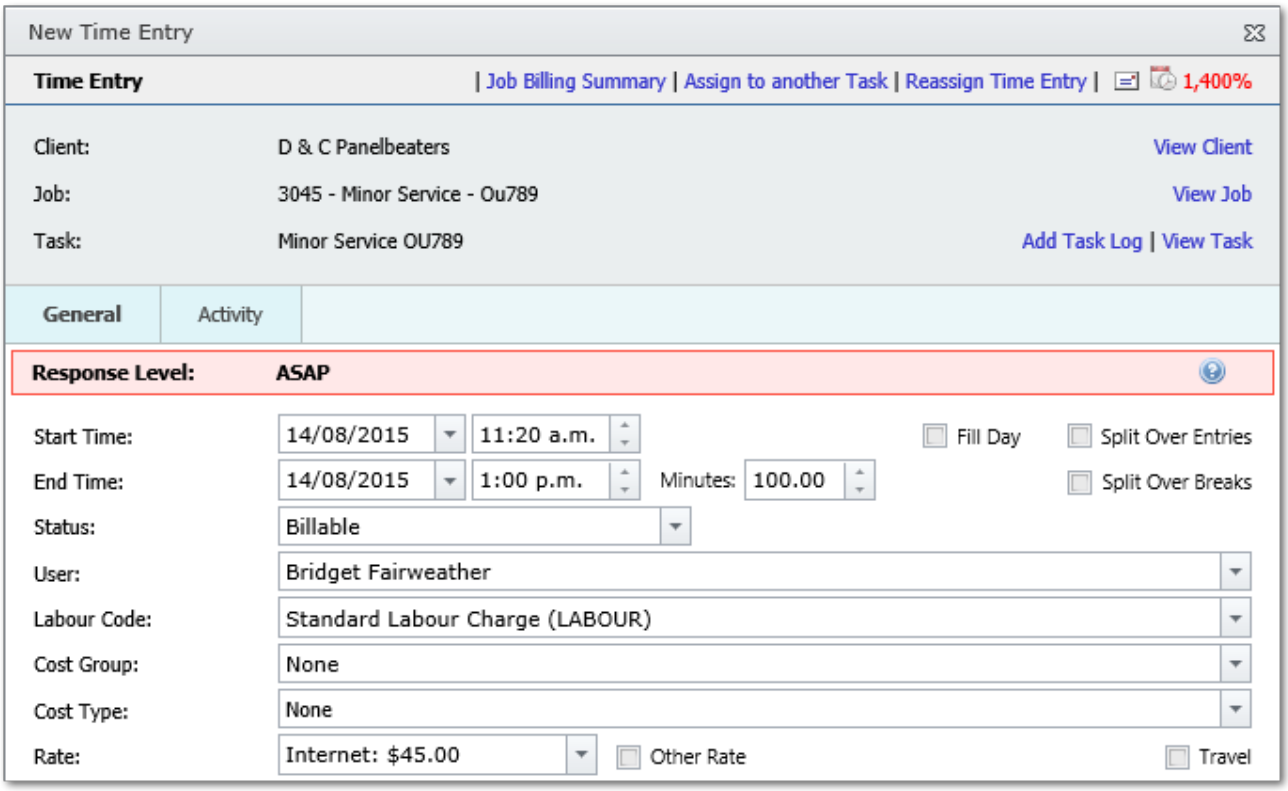
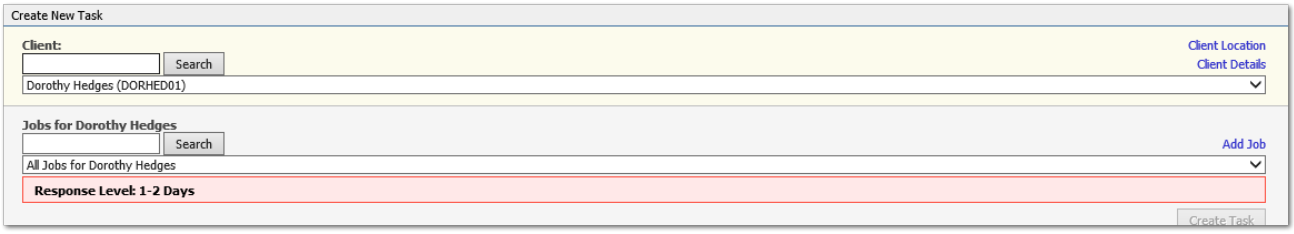


When entering a Time Entry in TimeTrak Professional, users will see a notification.



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



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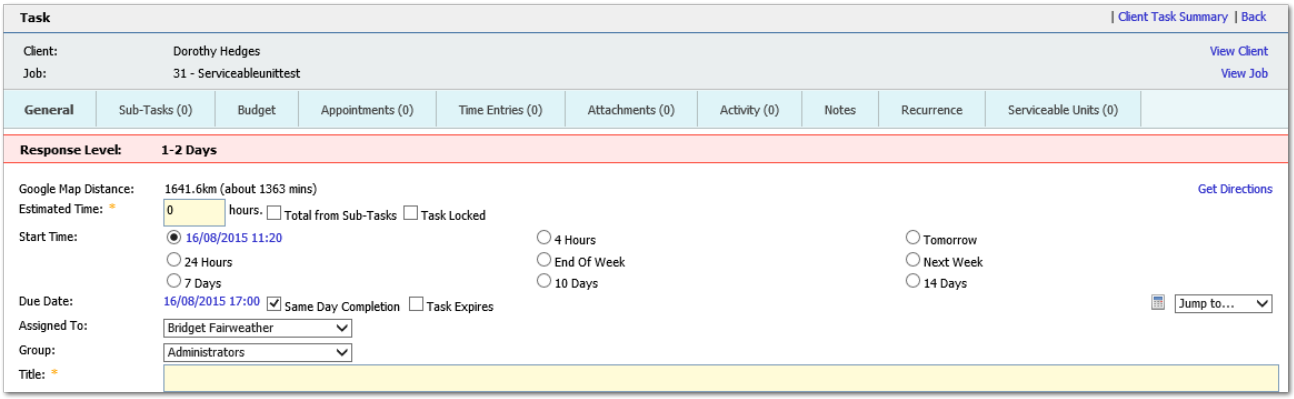
As well as in the Task Creation screen itself.



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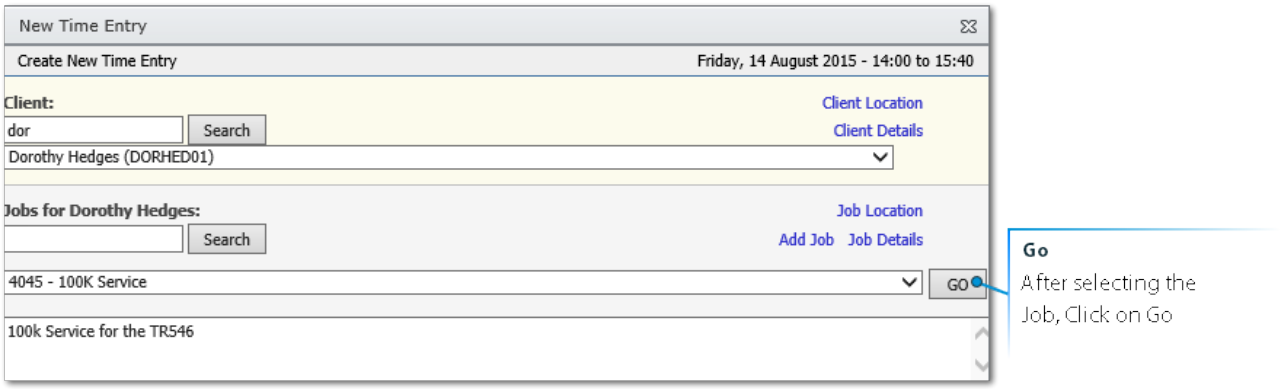
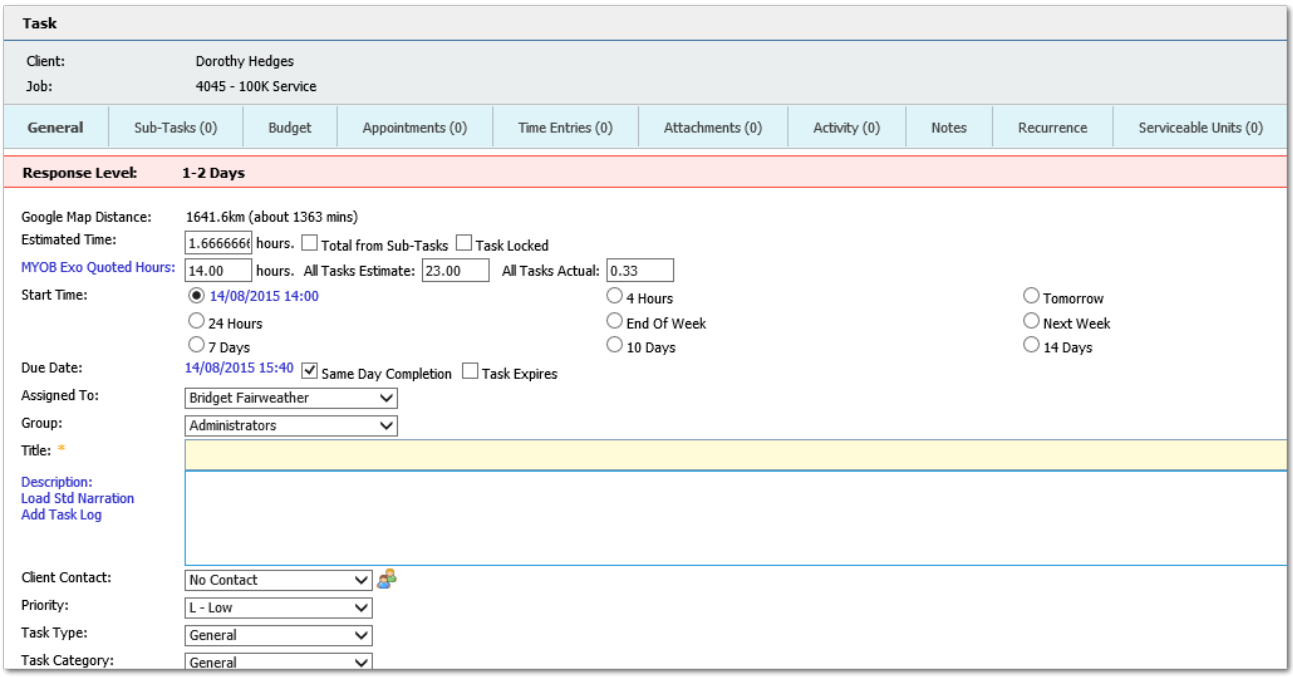
Time Only from a Task

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.



The next screen is the Task Creation Screen



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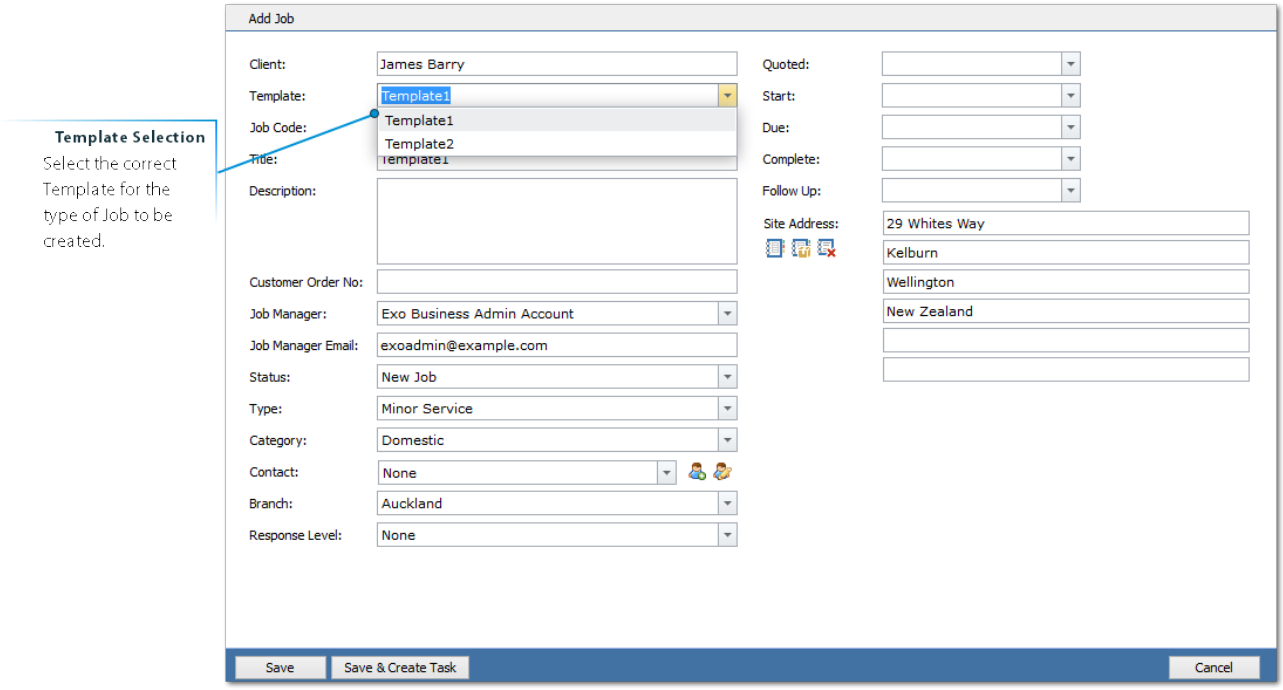
Template Job

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:



And in TimeTrak Mobile it will look like this:

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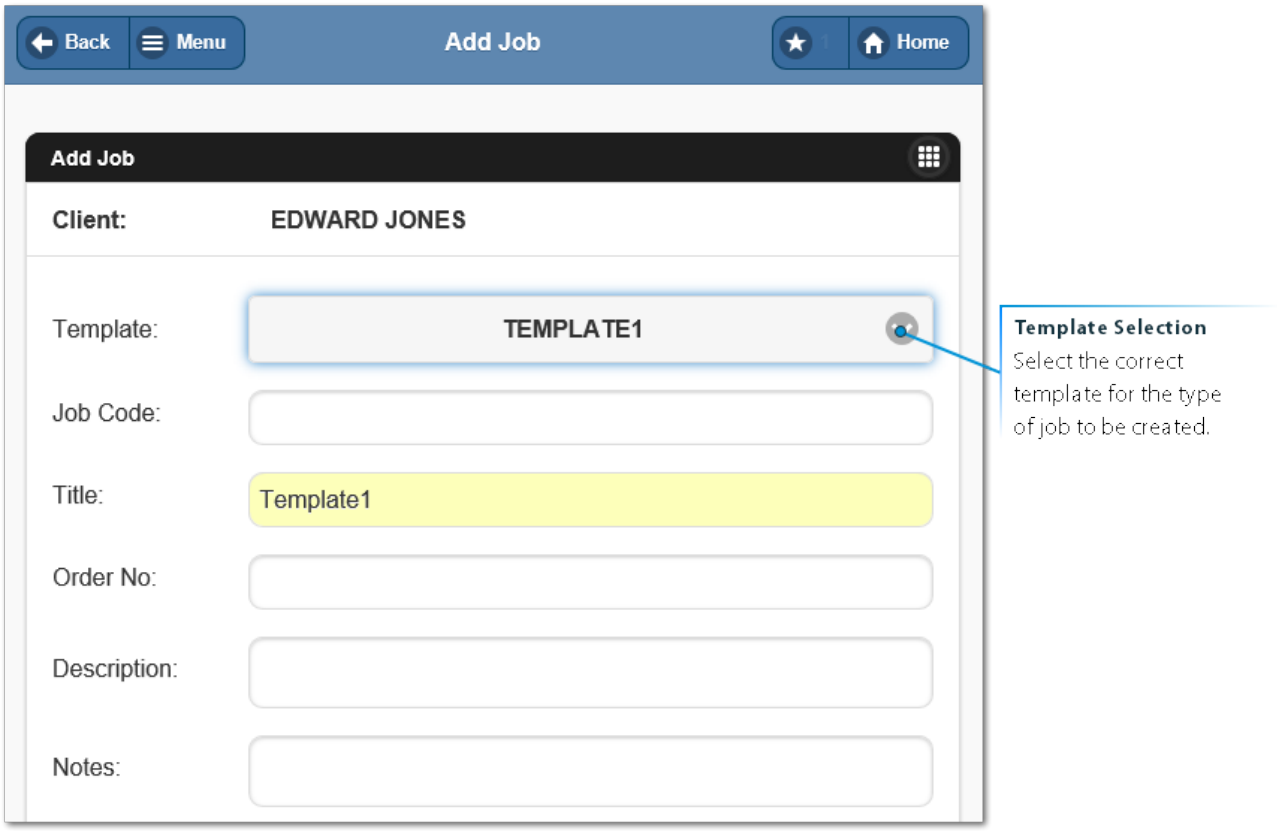

The newly created Job will have the same field values as the selected template.

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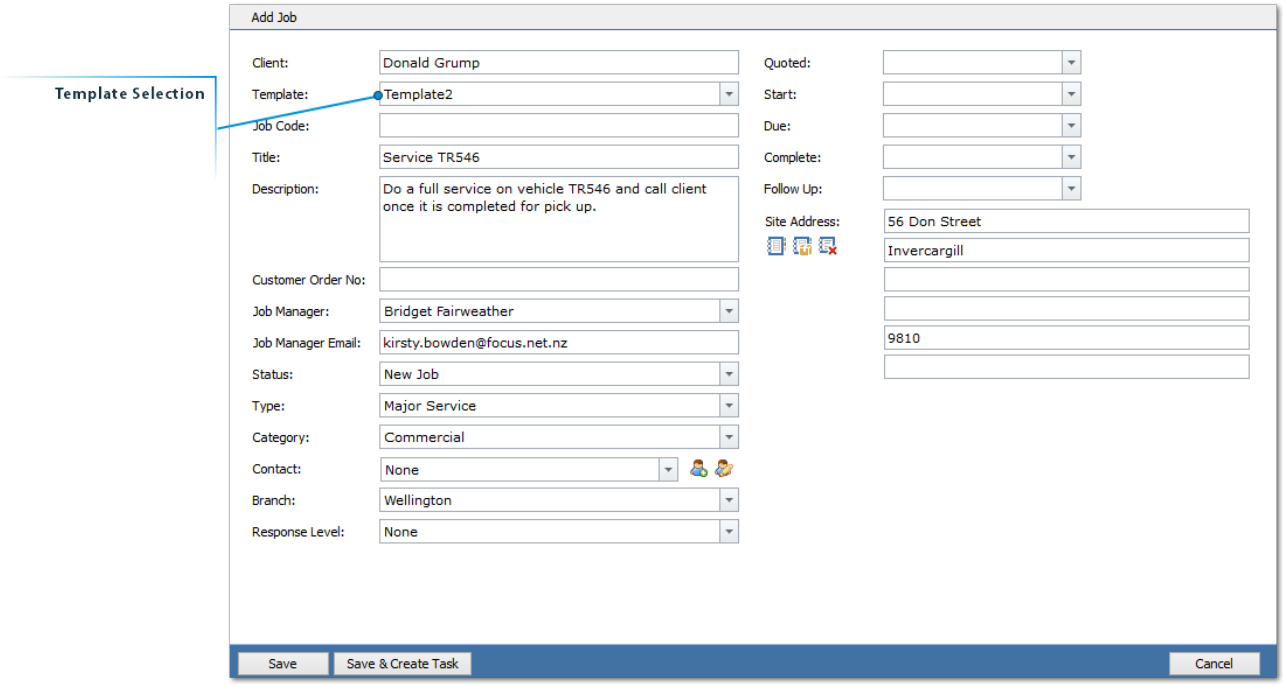
Copy Quote Lines

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.



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.

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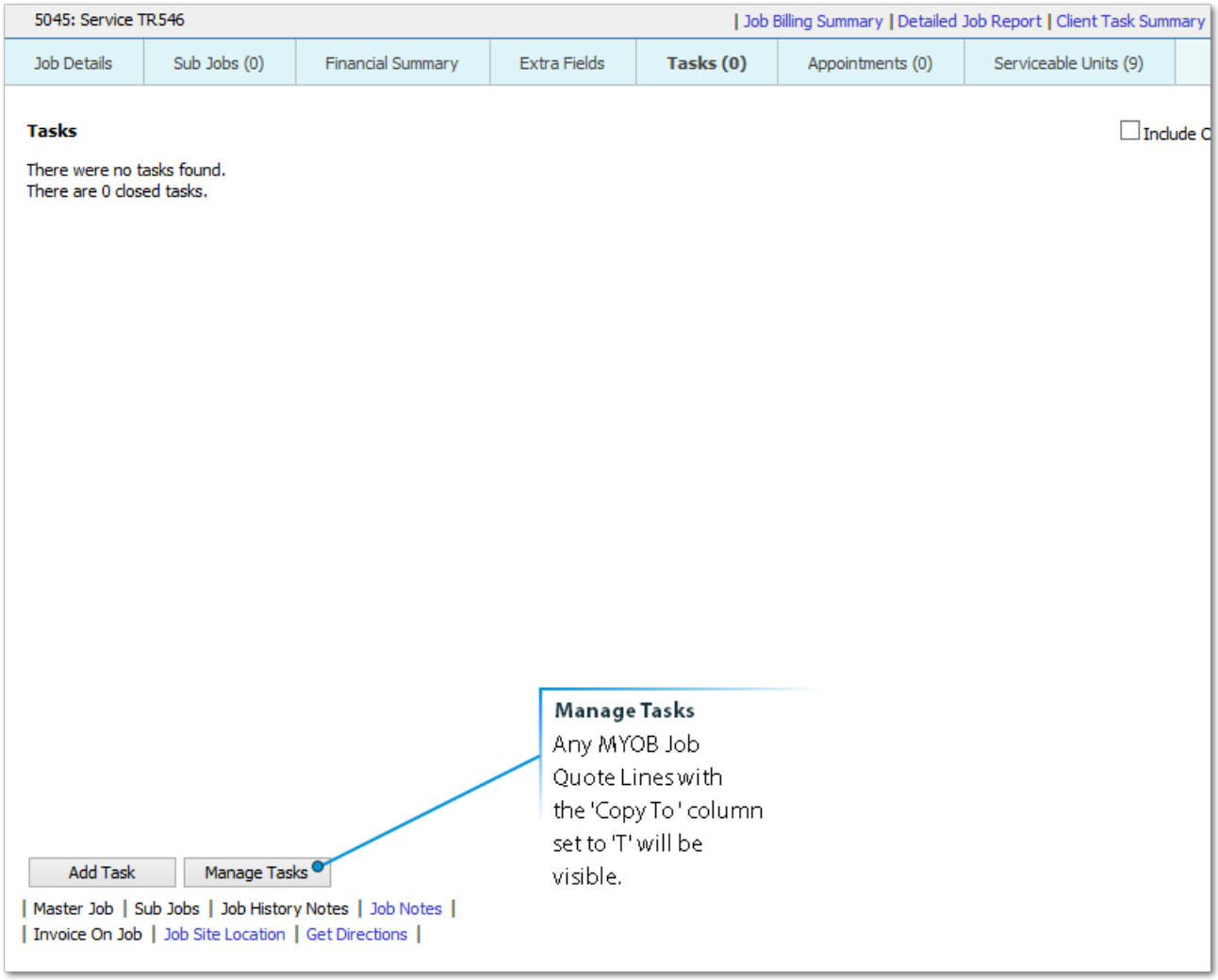

From within the Manage Tasks screen, any quote lines set with the '**Copy To**' column as '**T**' can be converted into a Task against the job.
Please see the TaskTrak Help Files for more information about Manage Tasks.

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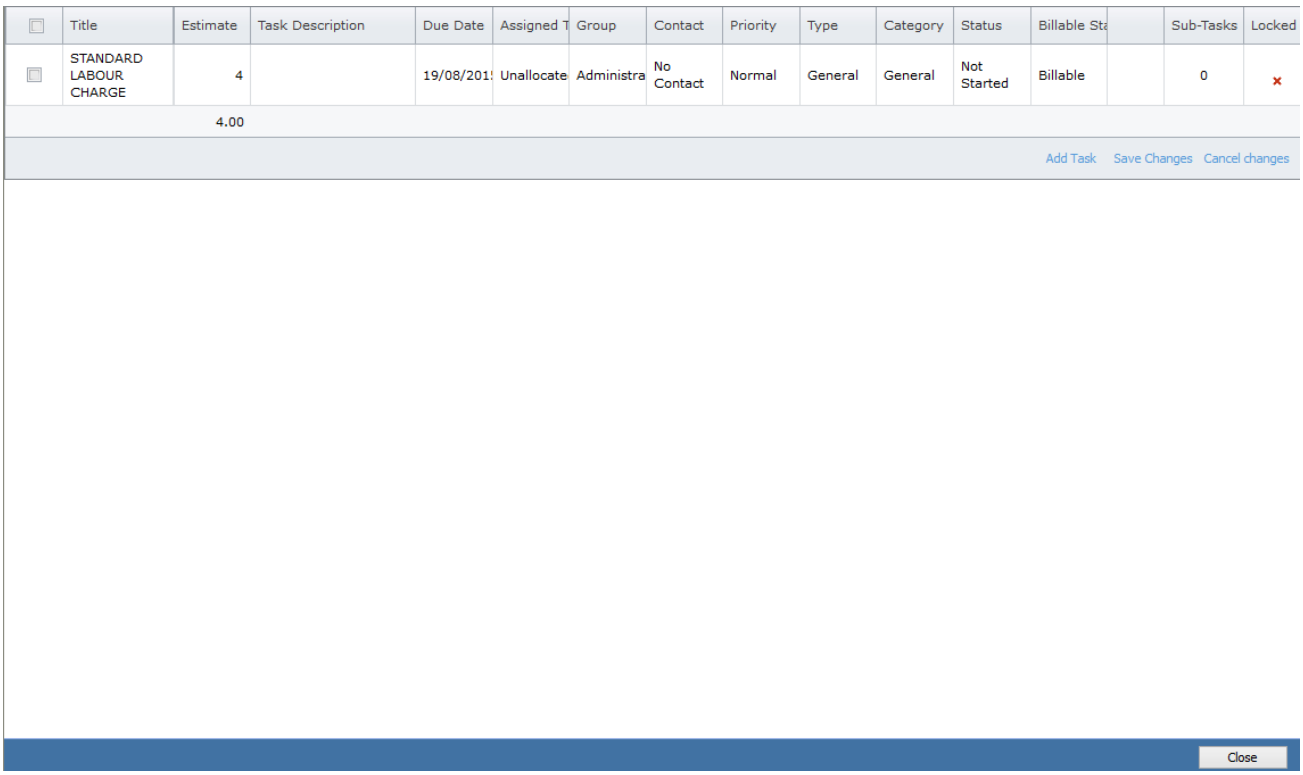

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