



TimeTrak Enhanced Measurable Claiming

2019

TimeTrak Enhanced Measurable Claiming

How to set up measurable claiming in TimeTrak

In previous TimeTrak versions, there is the ability to create and manage quote lines in mobile. Based on requests from some users, we heard that they also use quote lines as measurable units for the job they are doing. For example, 5 buckets of paint were brought and on the first day 1.5 buckets was used. This expense will record and reduce the quote lines of 5 buckets of paint to 3.5 buckets. This function is extremely useful if your business is fully dependent on quote lines to manage the budget of the project. This feature is used as a management tool to track the usage based on what has been quoted to the client. It doesn't affect job costing and is designed purely to track the progress of a job.

It is possible to apply a custom trigger so that once the measurable units are "consumed" the consumed amount is generated from the quote line to the costs of the job ready to be invoiced. Please consult to your TimeTrak consultant about this.

Note: Claim Measurables are only available in TimeTrak Mobile.

To enable this, two extra fields are required to be set up in EXO. Under the JOBCOST_LINES table, there are two existing extra fields that need to be enabled, **X_TT_Measurable** and **X_TT_TenderQty**.

The screenshot shows the MYOB Exo Configurator interface in Demo Mode. The main window displays the configuration for the **Table: JOBCOST_LINES** and **Field: X_TT_Measurable**. The **Display: Measurable** tab is active. The configuration details are as follows:

| Property | Value |
|------------------|---|
| Table name: | JOBCOST_LINES |
| Field name: | X_TT_Measurable |
| Display name: | MASTER_JOBNO NARRATIVE NARRATIVE_SEQNO NUNITPR OPLINEID OPTION_NO PREF_SERIALNO PRICE_OVERRIDDEN QUOTE_QTY QUOTE_UNITPR SCHEDULE_SEQNO SECTION SEQNO SHOW_ON_INVOICE SHOWLINE SNEXPDAYS SNTYPE SPREADVALUE STOCKCODE SUBCODE |
| Tooltip: | SUPPLIERNO |
| Data type: | TAXNO TAXRATE TOTAL_QUANTITY TRANSDATE UNITPRICE_INCTAX X_LABOUR_ALLOWANCE X_TT_CategoryId X_TT_GroupId X_TT_LastMeasureDate X_TT_Measurable X_TT_SubseqNo X_TT_TaskCategoryId X_TT_TaskId X_TT_TaskTypeId X_TT_TenderQty |
| Length: | |
| Position (1-38): | |
| Size: | |
| Dialog type: | |
| Lookup SQL: | |
| Key field: | |
| Display field: | |

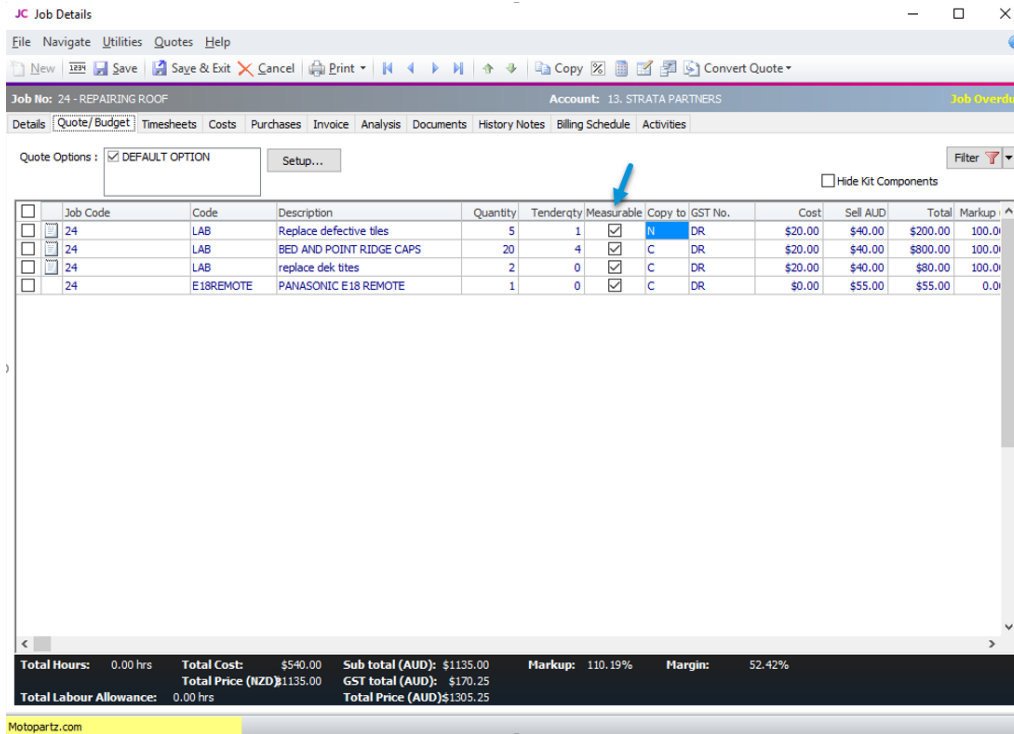
On the right side, a list of 38 fields is shown, with the first four fields selected:

- 01. X_LABOUR_ALLOWANCE
- 02. X_LABOUR_ALLOWANCE
- 03. X_TT_Measurable
- 04. X_TT_TenderQty

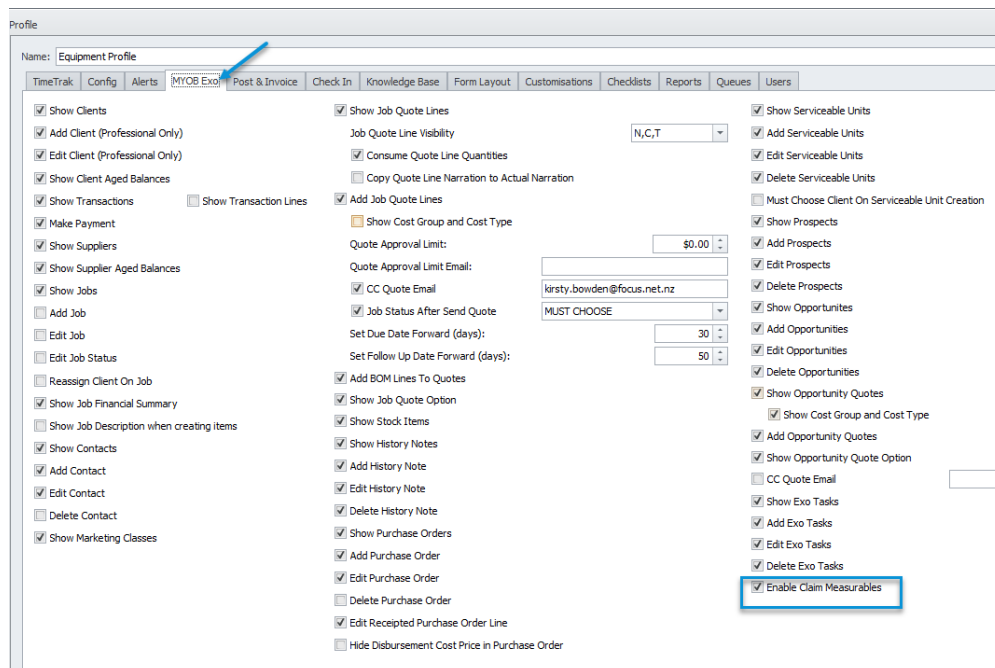
Fields 05 through 38 are listed as "Not used".

Two blue circles with numbers 1 and 2 are overlaid on the screenshot. Circle 1 points to the **X_TT_Measurable** field in the field list, and circle 2 points to the **X_TT_TenderQty** field in the field list.

Once these fields are activated quote lines can begin to be created in EXO. This is similar to adding a new quote line but there will be two new fields available. Assign a tick on “Measurable”, this enables TimeTrak to see it as a measurable unit.

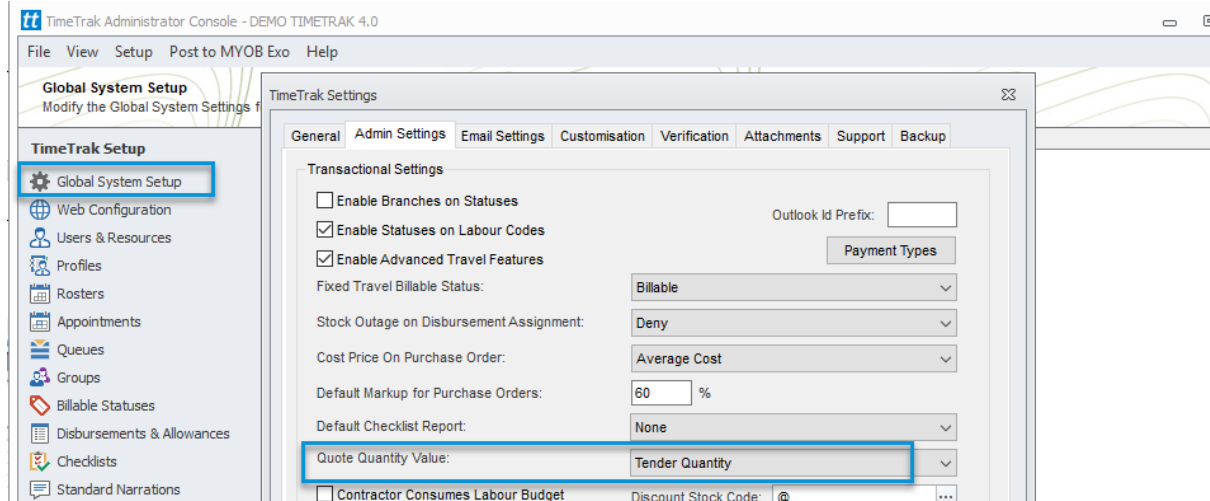


In the TimeTrak Administration Console under Profiles, ensure “Enable Claim Measurable” is enabled as well as “Show Job Quote Lines” to allow users to view these in mobile.



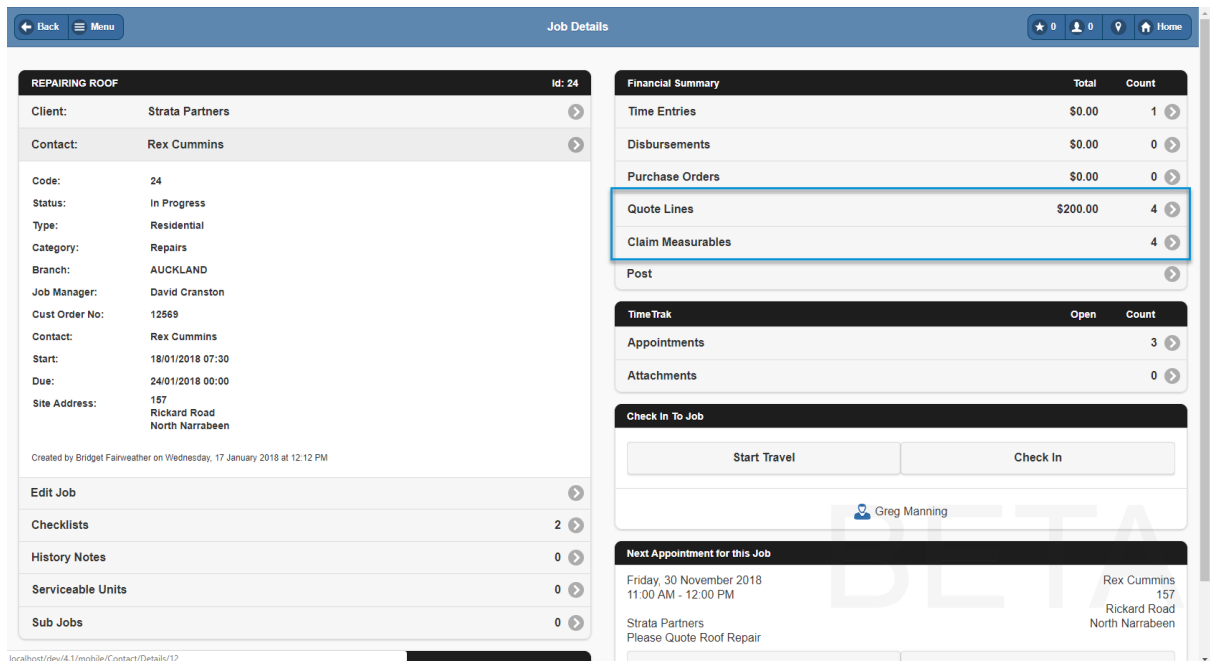
Setting up as tender quantity

While creating a quote line, you can set the quantity for the quote as a normal quantity or as a tender quantity. Under the global system setup, you can enable the quote quantity value as tender quantity on admin settings. This setting is to ensure the quantity you put under quote lines displays as tender quantity. You can see this under claim measureable in Mobile.



Measureable unit in TimeTrak Mobile

In TimeTrak Mobile, you can immediately see this display under Job Details which displays a measureable function if there is a measureable quote line. If the job doesn't have quote lines with a measureable function it will be hidden.



Quote lines can still be added as a measureable unit from here. Ensure you tick on the measureable feature to enable it.

Quote Lines

Hide Kit Components

| Stock Code | Description | Quote Option | Quantity | Used | Remaining | Unit Price | Line Total |
|------------|--------------------------|----------------|----------|------|-----------|------------|------------|
| LAB | Replace defective tiles | DEFAULT OPTION | 1 | 0 | 1.00 | \$40.00 | \$40.00 |
| LAB | BED AND POINT RIDGE CAPS | DEFAULT OPTION | 4 | 0 | 4.00 | \$40.00 | \$160.00 |
| LAB | replace dek tiles | DEFAULT OPTION | 0 | 0 | 0.00 | \$40.00 | \$0.00 |
| E18REMOTE | PANASONIC E18 REMOTE | DEFAULT OPTION | 0 | 0 | 0.00 | \$55.00 | \$0.00 |

Add Quote Line

Job: REPAIRING ROOF
Stock Code: CERFUS

Description: CERAMIC FUSES

Quantity: 0

Cost: 0

Sell: 6.5 \$6.50

Quote Option: DEFAULT OPTION

Copy To: C - Disbursement

Narration

Serviceable Unit

Custom Fields

X TT Measurable

Save

*This must be enabled
Note: The custom field name can be different depending on how it's set up in Exo*

Within the Claim Measurable window this will now display the new line added.

Claim Measurables

Hide Kit Components

| Stock Code | Description | Last Measure By | Last Measure Date | Tender Quantity | Completed TD | Completed TD % |
|------------|--------------------------|-----------------|-------------------|-----------------|--------------|----------------|
| LAB | Replace defective tiles | | | 1 | 0 | 0.00% |
| LAB | BED AND POINT RIDGE CAPS | | | 4 | 0 | 0.00% |
| LAB | replace dek tiles | | | 0 | 0 | 0 |
| E18REMOTE | PANASONIC E18 REMOTE | | | 0 | 0 | 0 |
| CERFUS | CERAMIC FUSES | | | 5 | 0 | 0.00% |

Return To Job

There is customisation that can be applied where Quote Lines can be bought through to the costs tab Exo if required.

When you click any of the measurable items, you can see the tender quantity and you can enter the quantity that has been used/done to record the progress.

In the quantity section, you can see the remaining quantity which is based on the tender quantity that has been put in the quote line.

Add Claim Measurable

Job: REPAIRING ROOF
Stock Code: TOPTRUNKING

Description: 60 X 38MM TOP HAT TRUNKING (PER METRE)

Tender Quantity: 8

Previous Completed: 0

Completed To Date: 0

Completed To Date %: 0

Quantity: 0 Add Remaining 8

Narration:

Save
Return to Job
Cancel

When you enter the consumed quantity, and save it, you can see the last person that updated the item and also the completion percentage.

Claim Measurables

| Stock Code | Description | Last Measure By | Last Measure Date | Tender Quantity | Completed TD | Completed TD % |
|-------------|--|-----------------|---------------------|-----------------|--------------|----------------|
| LAB | Replace defective tiles | | | 1 | 0 | 0.00% |
| LAB | replace dek tites | | | 0 | 0 | 0.00% |
| E18REMOTE | PANASONIC E18 REMOTE | | | 0 | 0 | 0.00% |
| CERFUS | CERAMIC FUSES | | | 5 | 0 | 0.00% |
| TOPTRUNKING | 60 X 38MM TOP HAT TRUNKING (PER METRE) | Greg Manning | 09/01/2019 11:54 AM | 8 | 3 | 37.50% |

Return To Job
Commit Measures

At the bottom of the line itself, you can even see the history of the transaction that has been made previously.

Add Claim Measurable

Job: REPAIRING ROOF
Stock Code: TOPTRUNKING

Description: 60 X 38MM TOP HAT TRUNKING (PER METRE)

Tender Quantity: 8

Previous Completed: 3

Completed To Date: 3

Completed To Date %: 37.5

Quantity: 0 Add Remaining 5

Narration:

Save ➤

Return to Job ➤

Cancel ➤

Previous Transactions

| Stock Code | Description | Measure By | Measure Date | Quantity | Previous |
|-------------|--|--------------|---------------------|----------|----------|
| TOPTRUNKING | 60 X 38MM TOP HAT TRUNKING (PER METRE) | Greg Manning | 09/01/2019 11:54 AM | 3 | 0 |

In case users enter the wrong amount for the quantity, in Mobile there is now the ability to put a negative number to revert back to the correct amount.

Note: Users will need to put narration as a note of why the quantity is negative.

Add Claim Measurable

Job: REPAIRING ROOF
Stock Code: TOPTRUNKING

Description: 60 X 38MM TOP HAT TRUNKING (PER METRE)

Tender Quantity: 8

Previous Completed: 3

Completed To Date: 1

Completed To Date %: 12.50

Quantity: -2 Add Remaining 5

Narration: Wrong input

Save ➤

Return to Job ➤

Cancel ➤

After a quantity has been entered against any measureable unit, users can commit measures. Prior to committing measures, the data is only saved within TimeTrak.

Once measures are committed, it will update the database table (**dbo.MeasurableTransactions**) where information can be used to report upon.

| Stock Code | Description | Last Measure By | Last Measure Date | Tender Quantity | Completed TD | Completed TD % |
|-----------------|--|-----------------|---------------------|-----------------|--------------|----------------|
| LAB | Replace defective tiles | Greg Manning | 09/01/2019 11:58 AM | 1 | 1 | 100.00% |
| LAB | replace dek tites | | | 0 | 0 | 0.00% |
| E18REMOTE | PANASONIC E18 REMOTE | | | 0 | 0 | 0.00% |
| CERFUS | CERAMIC FUSES | Greg Manning | 10/01/2019 03:26 PM | 5 | 2 | 40.00% |
| TOPTRUNKING | 60 X 38MM TOP HAT TRUNKING (PER METRE) | Greg Manning | 10/01/2019 03:14 PM | 8 | 4 | 50.00% |
| Return To Job | | | | | | |
| Commit Measures | | | | | | |

For example, the database is shown as per below.

| | | | | | | | | | | |
|----|----|----|----|---|-------------|--|---|----|-------------------------|-------------|
| 17 | 17 | 37 | 24 | 4 | TOPTRUNKING | 60 X 38MM TOP HAT TRUNKING (PER METRE) | 3 | -2 | 2019-01-09 12:00:39.333 | Wrong input |
| 18 | 18 | 38 | 17 | 4 | ELEC5M | ELECTRICAL CABLE 5M | 0 | 2 | 2019-01-09 15:41:43.623 | NULL |
| 19 | 19 | 39 | 30 | 4 | ELEC3M | ELECTRICAL CABLE 3M | 0 | 2 | 2019-01-09 15:43:34.403 | NULL |
| 20 | 20 | 39 | 30 | 4 | ELEC3M | ELECTRICAL CABLE 3M | 2 | 1 | 2019-01-09 15:43:57.877 | NULL |
| 21 | 21 | 39 | 30 | 4 | ELEC3M | ELECTRICAL CABLE 3M | 3 | 3 | 2019-01-10 14:56:28.923 | NULL |
| 22 | 22 | 44 | 30 | 4 | .OUTOFHOURS | Out Of Hours | 0 | 3 | 2019-01-10 14:56:51.947 | NULL |
| 23 | 23 | 37 | 24 | 4 | TOPTRUNKING | 60 X 38MM TOP HAT TRUNKING (PER METRE) | 1 | 1 | 2019-01-10 15:13:20.907 | NULL |
| 24 | 24 | 37 | 24 | 4 | TOPTRUNKING | 60 X 38MM TOP HAT TRUNKING (PER METRE) | 2 | 2 | 2019-01-10 15:14:58.687 | NULL |
| 25 | 25 | 36 | 24 | 4 | CERFUS | CERAMIC FUSES | 0 | 2 | 2019-01-10 15:25:34.760 | NULL |

When a technician completed the job and used top hat trunking for 3 more units and then committed measures this displays as per below:

| Stock Code | Description | Last Measure By | Last Measure Date | Tender Quantity | Completed TD | Completed TD % |
|-----------------|--|-----------------|---------------------|-----------------|--------------|----------------|
| LAB | Replace defective tiles | Greg Manning | 09/01/2019 11:58 AM | 1 | 1 | 100.00% |
| LAB | replace dek tites | | | 0 | 0 | 0.00% |
| E18REMOTE | PANASONIC E18 REMOTE | | | 0 | 0 | 0.00% |
| CERFUS | CERAMIC FUSES | Greg Manning | 10/01/2019 03:25 PM | 5 | 2 | 40.00% |
| TOPTRUNKING | 60 X 38MM TOP HAT TRUNKING (PER METRE) | Greg Manning | 10/01/2019 04:16 PM | 8 | 7 | 87.50% |
| Return To Job | | | | | | |
| Commit Measures | | | | | | |

In the database, we could see that a new line is added for top hat trunking with the quantity 3. This information is very useful to create a report to track the usage of the measurable units.

| | | | | | | | | | | |
|----|----|----|----|---|-------------|--|---|---|-------------------------|------|
| 18 | 18 | 38 | 17 | 4 | ELEC5M | ELECTRICAL CABLE 5M | 0 | 2 | 2019-01-09 15:41:43.623 | NULL |
| 19 | 19 | 39 | 30 | 4 | ELEC3M | ELECTRICAL CABLE 3M | 0 | 2 | 2019-01-09 15:43:34.403 | NULL |
| 20 | 20 | 39 | 30 | 4 | ELEC3M | ELECTRICAL CABLE 3M | 2 | 1 | 2019-01-09 15:43:57.877 | NULL |
| 21 | 21 | 39 | 30 | 4 | ELEC3M | ELECTRICAL CABLE 3M | 3 | 3 | 2019-01-10 14:56:28.923 | NULL |
| 22 | 22 | 44 | 30 | 4 | .OUTOFHOURS | Out Of Hours | 0 | 3 | 2019-01-10 14:56:51.947 | NULL |
| 23 | 23 | 37 | 24 | 4 | TOPTRUNKING | 60 X 38MM TOP HAT TRUNKING (PER METRE) | 1 | 1 | 2019-01-10 15:13:20.907 | NULL |
| 24 | 24 | 37 | 24 | 4 | TOPTRUNKING | 60 X 38MM TOP HAT TRUNKING (PER METRE) | 2 | 2 | 2019-01-10 15:14:58.687 | NULL |
| 25 | 25 | 36 | 24 | 4 | CERFUS | CERAMIC FUSES | 0 | 2 | 2019-01-10 15:25:34.760 | NULL |
| 26 | 26 | 37 | 24 | 4 | TOPTRUNKING | 60 X 38MM TOP HAT TRUNKING (PER METRE) | 4 | 3 | 2019-01-10 16:16:07.500 | NULL |

Note: Please ask you're your TimeTrak consultant if you want to create a custom report that is suitable for your business needs.

Measurable Unit Report

| Commit Date | Trans Date | Description | Qty | Committed By | Created By |
|------------------|------------------|--|-----|--------------|--------------|
| 26/11/2018 15:23 | 26/11/2018 15:15 | STANDARD LABOUR | 2 | Greg Manning | Greg Manning |
| 26/11/2018 15:27 | 26/11/2018 15:26 | STANDARD LABOUR | 2 | Greg Manning | Greg Manning |
| 27/11/2018 10:53 | 26/11/2018 16:20 | STANDARD LABOUR | 1 | Greg Manning | Greg Manning |
| 27/11/2018 10:57 | 27/11/2018 10:57 | STANDARD LABOUR | 2 | Greg Manning | Greg Manning |
| 27/11/2018 12:56 | 27/11/2018 12:56 | Out Of Hours | 1 | Greg Manning | Greg Manning |
| 27/11/2018 13:01 | 27/11/2018 13:01 | Out Of Hours | 1 | Greg Manning | Greg Manning |
| 27/11/2018 13:06 | 27/11/2018 13:06 | Out Of Hours | 1 | Greg Manning | Greg Manning |
| 27/11/2018 13:10 | 27/11/2018 13:10 | Out Of Hours | 1 | Greg Manning | Greg Manning |
| 27/11/2018 14:12 | 27/11/2018 14:12 | Out Of Hours | 1 | Greg Manning | Greg Manning |
| 27/11/2018 14:24 | 27/11/2018 14:23 | Out Of Hours | 1 | Greg Manning | Greg Manning |
| 27/11/2018 14:41 | 27/11/2018 14:39 | Out Of Hours | 1 | Greg Manning | Greg Manning |
| 10/01/2019 15:14 | 8/01/2019 16:43 | BED AND POINT RIDGE CAPS | 2 | Greg Manning | Greg Manning |
| 10/01/2019 15:14 | 8/01/2019 16:52 | BED AND POINT RIDGE CAPS | 4 | Greg Manning | Greg Manning |
| 10/01/2019 15:14 | 9/01/2019 11:54 | 60 X 38MM TOP HAT TRUNKING (PER METRE) | 3 | Greg Manning | Greg Manning |
| 10/01/2019 15:14 | 9/01/2019 11:57 | Replace defective tiles | 2 | Greg Manning | Greg Manning |
| 10/01/2019 15:14 | 9/01/2019 11:58 | Replace defective tiles | -1 | Greg Manning | Greg Manning |
| 10/01/2019 15:14 | 9/01/2019 12:00 | 60 X 38MM TOP HAT TRUNKING (PER METRE) | -2 | Greg Manning | Greg Manning |
| 10/01/2019 15:03 | 9/01/2019 15:43 | ELECTRICAL CABLE 3M | 2 | Greg Manning | Greg Manning |
| 10/01/2019 15:03 | 9/01/2019 15:43 | ELECTRICAL CABLE 3M | 1 | Greg Manning | Greg Manning |
| 10/01/2019 15:03 | 10/01/2019 14:56 | ELECTRICAL CABLE 3M | 3 | Greg Manning | Greg Manning |
| 10/01/2019 15:03 | 10/01/2019 14:56 | Out Of Hours | 3 | Greg Manning | Greg Manning |
| 10/01/2019 15:14 | 10/01/2019 15:13 | 60 X 38MM TOP HAT TRUNKING (PER METRE) | 1 | Greg Manning | Greg Manning |
| 10/01/2019 15:15 | 10/01/2019 15:14 | 60 X 38MM TOP HAT TRUNKING (PER METRE) | 2 | Greg Manning | Greg Manning |
| 10/01/2019 16:17 | 10/01/2019 15:25 | CERAMIC FUSES | 2 | Greg Manning | Greg Manning |
| 10/01/2019 16:17 | 10/01/2019 16:16 | 60 X 38MM TOP HAT TRUNKING (PER METRE) | 3 | Greg Manning | Greg Manning |

Measurable claiming in TimeTrak Professional

Measurable units are only available in Mobile. However in TimeTrak Professional, you can add a quote lines that can be marked as measurable units for mobile users.

This is a useful process for team leaders or managers so they can create a quote through TimeTrak Professional.

Under the job, click the quote lines tab and add new quote lines.

Job - REPAIRING ROOF (Code: 24) (Id: 24) x

| | | | | | | | |
|-------------------|--------------|-----------------------|-------------------|---------------------|------------------|-----------------------|-----------|
| Details | Sub Jobs (0) | Job Financial Summary | Location | Appointments (3) | Time Entries (1) | Tasks (0) | Notes (0) |
| History Notes (0) | Articles (0) | Attachments (0) | Disbursements (0) | Purchase Orders (0) | Quote Lines (4) | Serviceable Units (0) | Reports |

Search

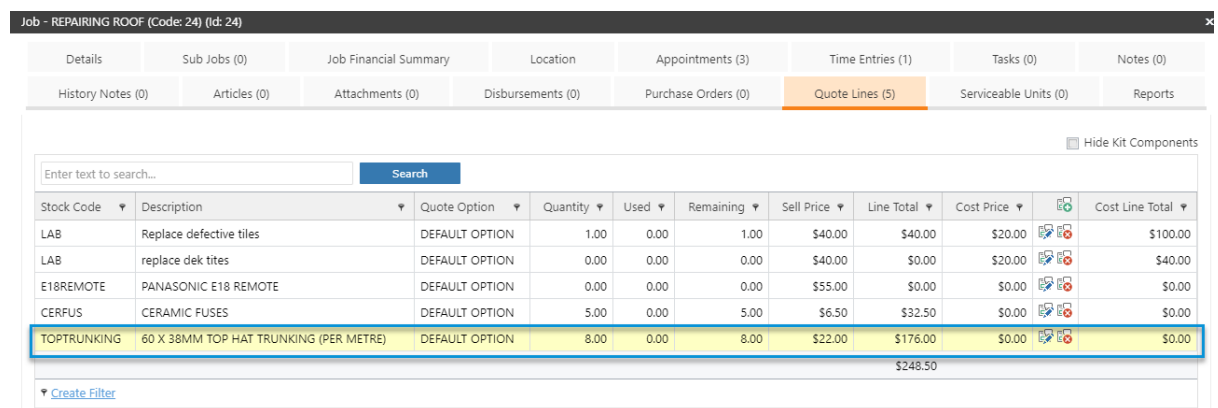
| Stock Code | Description | Quote Option | Quantity | Used | Remaining | Sell Price | Line Total | Cost Price | Cost Line Total |
|------------|-------------------------|----------------|----------|------|-----------|------------|------------|------------|-----------------|
| LAB | Replace defective tiles | DEFAULT OPTION | 1.00 | 0.00 | 1.00 | \$40.00 | \$40.00 | \$20.00 | \$100.00 |
| LAB | replace dek tiles | DEFAULT OPTION | 0.00 | 0.00 | 0.00 | \$40.00 | \$0.00 | \$20.00 | \$40.00 |
| E18REMOTE | PANASONIC E18 REMOTE | DEFAULT OPTION | 0.00 | 0.00 | 0.00 | \$55.00 | \$0.00 | \$0.00 | \$0.00 |
| CERFUS | CERAMIC FUSES | DEFAULT OPTION | 5.00 | 0.00 | 5.00 | \$6.50 | \$32.50 | \$0.00 | \$0.00 |
| | | | | | | | \$72.50 | | |

[Create Filter](#)

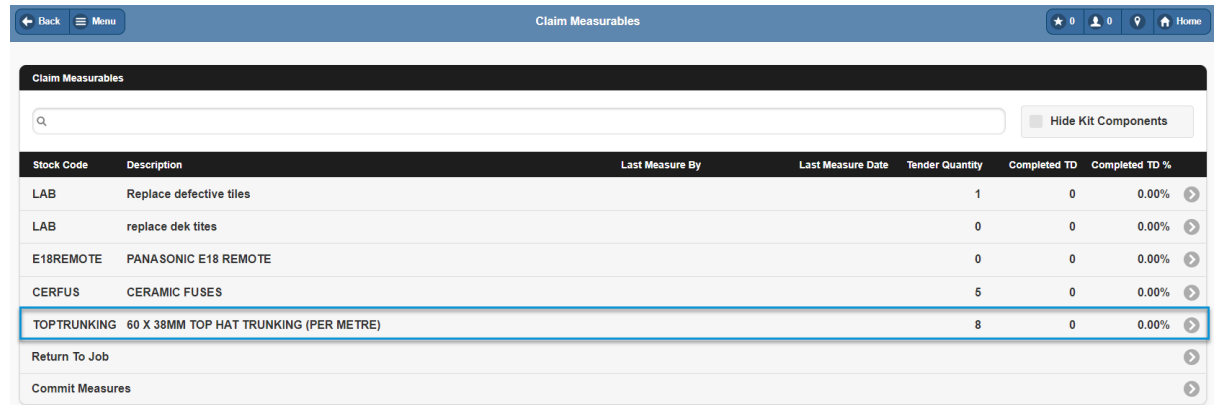
When you are creating a new quote line for a measurable unit, similar to mobile, go to custom fields and enable **X TT Measurable**.



As you can see in the example below, a new quote line has added into the job



This means that this item can also can be accessed as a measurable unit in TimeTrak Mobile.



Quote Options on Claim Measurables

Quote Option can be made visible in Mobile. This setting is activated this against the Profile ERP settings in Administrator Console

Add Claim Measurable

Job: SET UP NEW MACHINE TEST

Stock Code: ESTH

Quote Option: **Quote 2**

Description: E5 Edge Line Thermo

Tender Quantity: 0

Previous Completed: 0

Completed To Date: 0

Completed To Date %: 0

Quantity: 0

Narration:

Save ➤

Return to Job ➤

Cancel ➤

Previous Transactions

| Stock Code | Description | Measure By | Measure Date | Quantity | Previous |
|--|-------------|------------|--------------|----------|----------|
| There are no measurable transactions that match the search criteria. | | | | | |

Bill of materials in quote lines settings

To enhance these features, we also added bill of materials (BOM) to be included into quote lines. Some businesses, use BOM as a group of stock items which are measurable while they are doing the job.

There is a new profile setting to add BOM lines to quote lines and also for the ability to add new BOM Claim measurable as per below:

The screenshot shows the 'PROFILE SETUP' window for 'Mobile Profile'. The left sidebar has 'Profiles' highlighted with a blue arrow. The main window shows a list of profiles with 'Mobile Profile' selected, also indicated by a blue arrow. Below the list, the 'Profile' configuration for 'Mobile Profile' is shown. Several settings are highlighted with blue boxes and arrows:

- Show Job Quote Lines
- Add Job Quote Lines
- Add BOM Lines To Quotes
- Enable Claim Measurables
- Allow New Stock Item Measurables
- Allow New Bill Of Material Measurables

The difference between a standard quote line claim measurable and a measurable is the quantity.

You will see in the ERP system a quote line has a quantity (quantity that you expect to bill) however a measurable added via TimeTrak mobile has a quantity of zero.

Job No: 21 - SET UP NEW MACHINE Account: 12. COTTON SEED DISTRIBUTORS Job Progress OK

Quote Options: DEFAULT OPTION Setup... Filter

Hide Kit Components

| Job Code | Code | Description | Quantity | Unit | Copy to | GST No. | Cost | Sell | Total | Markup |
|----------|-------------|---------------------------------|----------|------|---------|---------|---------|----------|------------|--------|
| 21 | LAB2 | DOUBLE TIME LABOUR | | | N | DR | \$40.00 | \$160.00 | \$320.00 | 300.0% |
| 21 | CERFLUS | CERAMIC FUSES | | | N | DR | \$0.00 | \$6.50 | \$19.50 | 0.0% |
| 21 | RF835A | RF835 WIRELESS SECURITY DETE... | 4 | 4 | N | DR | \$0.00 | \$410.00 | \$1,640.00 | 0.0% |
| 21 | .OUTOFHOURS | Out Of Hours | 10 | 0 | C | DR | \$20.00 | \$100.00 | \$1,000.00 | 400.0% |
| 21 | .OUTOFHOURS | Out Of Hours | 0 | 10 | C | DR | \$0.00 | \$100.00 | \$0.00 | 0.0% |
| 21 | .OUTOFHOURS | Testing BOM | 0 | 100 | C | DR | \$0.00 | \$100.00 | \$0.00 | 0.0% |
| 21 | .OUTOFHOURS | BOM 2 | 0 | 50 | C | DR | \$0.00 | \$100.00 | \$0.00 | 0.0% |

Total Hours: 0.00 hrs Total Cost: \$280.00 Sub total: \$2,979.50 Markup: 964.11% Margin: 90.60%
 Total Labour Allowance: 0.00 hrs GST total: \$46.93 Total Price: \$3,426.43

Motopartz.com

This feature is designed so that field staff can add additional measurables to the job if required but they will not be billed due to the zero quantity.