Timekeeper Instructions

The Log:

The only screens you will be using are the Fee and Cost Log and the Prebill. The Log is for recording entries as they occur. The Prebill is for editing your entries grouped by client and date.

You can tab through or mouse through data fields.

Date, Client ID, Client name, Hours (fees) and (Amount) Code, description and save are the data field with which you are concerned.

Date: The default is today's date. If another date, type in the date or select the date from the drop-down calendar. You can hold the date by selecting HD above Hours.

Client ID: (optional) if you know the Client ID, type it in here and the Client Name will appear in the next field. If you do not know the client ID, tab or mouse to the Client name field.

Client Name: Start typing the client name when you type enough to narrow to the client, tab to choose the client and move to the Hours field.

Hours: Hours are in 10ths and 100ths. There is a button to add a 10^{th} of an hour with each click. A 10^{th} is 6 minutes. .25 is 15 minutes, .50 is 30 minutes, .75 is 45 minutes. When you enter the hours increment it will automatically compute times your hour rate. There are many ways to change that amount if you want a different amount. The Easiest is by entering the amount you want.

Codes: (optional) Currently Codes and their corresponding description are added, modified and deleted by the systems administrator. In a few months you will be able to manage your own codes and corresponding description. When you enter and tab through a code or select it with your mouse it will expand into description at the beginning or where your cursor is located.

Description: If you are using codes, you can also use free form description. For instance, you might have used a code that expanded to Telephone call with and then added Mr. John Baker.

Save: Press the save button.

Once you save an entry it will appear in the log entry list below.

Some additional features:

Duplicate Previous: Anytime you place your cursor in a data field and press this button it will duplicate data from the previous entry data field into this data field. Very handy for entries to the same client or date.

Change a saved entry: Select the entry on the log list, it will appear in the Log Form above make your change and save.

Delete a saved entry: Select the entry on the Log List, it will appear in the Log Form above. Press the Delete button.

Clear the screen (non-saved entries): Press the Clear button.

Making a No Charge entry: Enter the hours, enter a zero in amount. Type or use a code for No Charge in description and save.

Making a Courtesy Discount entry: Enter a zero in hours and a minus sign before the discount in amount. E.g. -$300.00 for a $300 courtesy discount. In PC (not Mac) the minus will become parentheses $(300.00)

Prebill

The prebill presents your entries in client order and date order so you can edit them.

Select the client on the left that you want to review. The entries will appear on the main screen to the right.

Select an entry and it will expand into a popup screen to which you can make any changes, delete the entry or cancel (changed your mind). You can change anything about the entry. Be sure to Save.

To add an entry, select New Log Entry (top screen right).

End