Tasks

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Introduction

Technical Support

Welcome to the instructional manual for the Tasks module within the Eagle Business Management System (EBMS). In the sections following, explanations and examples of the available features within the Tasks Module will be explained. If you need to reach our staff for further help, contact us using the information below:

Eagle Business Software

5351 Lincoln Highway, Suite 9

Gap, PA 17527

(717) 442-3247 x2

(717)-442-1096 fax

www.EagleBusinessSoftware.com

Email: Support@EagleBusinessSoftware.com

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Overview

The task module is useful in managing a variety of work orders, phone calls, contacts, and other tasks. These tasks are conveniently connected to customers, sales orders, serialized whole goods, timecard detail, and/or jobs. The following examples will demonstrate some of the popular uses for this module

- **Organizing, scheduling, and printing work orders:** The task module can be used to schedule work orders for almost any service business. The task work order system is a power tool for electricians, vehicle repair centers, small engine repair, HVAC companies, computer repair, and almost any other service or repair business. Review the Using Tasks as Work Orders section for more details.

  The task module is a powerful tool to track the time and materials for T&M jobs or track the actual time spent on projects with an estimated time. Review the Time and Material tasks vs. Contract Tasks section for details on using tasks to track time.

  The multiple views can be configured by the user to group and query tasks in a wide variety of combinations. Review the Creating Multiple Views, Creating Queries , and Creating Task Groups for more details.

- **Evaluating the billable time for a service company:** Managing a service company or division requires affective tools to measure the efficiency of labor and employees. Comparing billable time to the actual time is a powerful way to evaluate the profitability of individual employees or an entire service department. The task module allows the user to manage labor more effectively by quantifying the billable time using different work codes within payroll. The management reports within EBMS allow the personnel manager to base employee pay on his/her efficiency and performance. Review the Billable Time section for more details.

- **Sales person's contact manager:** The task module is a useful tool for a sales person to track customer information, sales contacts, and other customer relation information. Review the Using Tasks as a Contact Manager section for more details.

- **Logging customer support contacts:** The task module includes a number of features to log, organize, and evaluate phone calls, service calls, and follow up contacts. Review the Using Phone Tasks section for more details.

- **Recording events contained within a specific job:** The powerful combination of the optional EBMS task and job costing modules are great to track labor, material, and billing processes within a construction, manufacturing, or other type of job or project. Review the Using Tasks and Job Costing for more details.

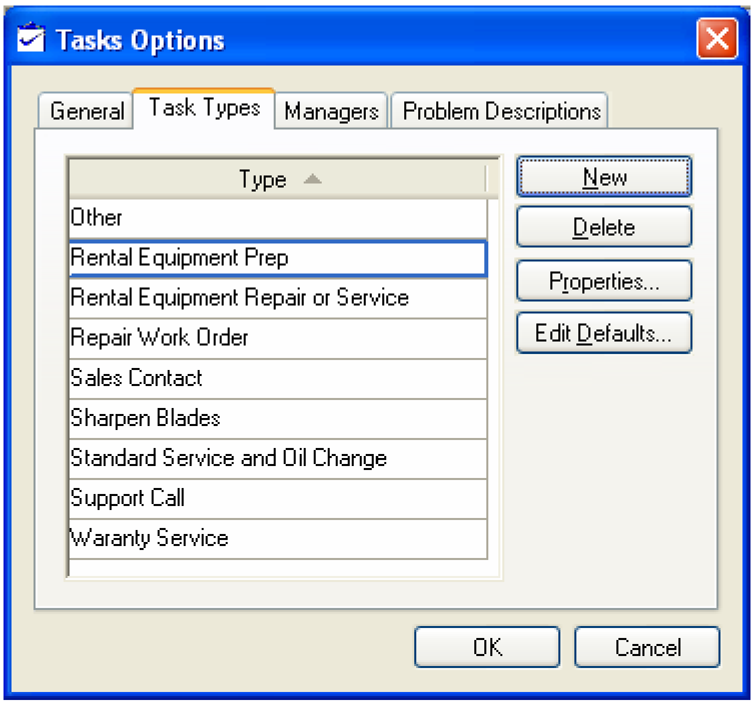
- **Tracking details for service contracts:** The task module can be used to track labor that is related to a service agreement or annual contract. Review the Using Tasks and Job Costing for details.

- **Maintaining history regarding individual pieces of equipment or whole goods:** Logging contacts, service history, and other task detail is very valuable in managing labor in a service business. Review the Reviewing Task History for more details.

Getting Started

Creating Task Types and Defaults

Planning the type of tasks that will be used within the EBMS system and creating these types will greatly simplify the task creation process. Task defaults and standard settings are created within the task type in a similar manner as setting defaults within a customer or inventory folder. To view, change, or create task types go to **Tasks > Options** and click on the **Task Types** tab as shown below:



A separate task type should be created if the base type is different (see base type explanation below) or the default settings of the task (such as labor work codes, service codes, approval processing) are different.

Select a task type and click the **Properties** button.

Creating a task type consists of 2 settings:

1. The task **Type** is the ID that identifies the type of task.

2. The **Base Type** is a setting that identifies the format of the new task wizard and some billing processes. The available **Base Types** are as follows:

    a. The **Phone** type is used to log phone contacts such as support calls. A task with a base type of **Phone** tracks the time immediately when the task wizard is launched. The phone task is marked completed when the wizard is completed. The **Phone** task should not be used for sales calls or phone tasks that are ongoing. Review the Using Phone Tasks section for an example of the new task wizard with a base type of **Phone**.

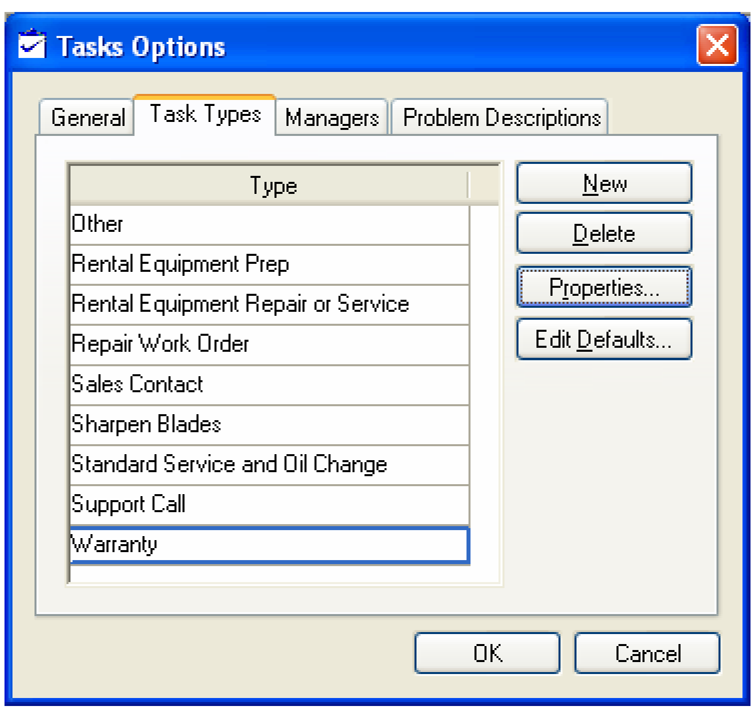
    b. The **Sales** base type allows the user to utilize the task module as a contact manager. Review the Using Tasks as a Contract Manager section for more details.

    c. The **Time and Materials Service** type should be used for any work order or project that is billed by the actual labor spent on the project rather than a fixed rate or contract. Use the **Contract Service** base type if the job is not billed based on the actual time spent on the project. This includes fixed rate jobs, contracts, or any other task that is not billed based on the total **Actual Time** entered in the **Time** tab of the task. Review the Time and Material tasks vs. Contract Tasks for more details.

    d. Use the **Warranty Service** type for tasks that require time but are not billed similar to the **Sales** base type.

    Click **OK** to return to the task type list.

The small engine repair and rental center may use a list of task types as shown below:



The following table lists the probable **Base Type** Setting as well as the default settings for each task type.

- The **Other** task type was created to be used when no other task types are applicable. This type will require the user to enter all the information for a task since the default settings of the other types do not apply. The base type for this setting should be **Contract Service** unless the miscellaneous task involves billing. Review the Billing a Project or Task section for billing details.

- Both **Rental Equipment Prep** and the **Rental Equipment Repair or Service** types have a base type of **Contract Service** since rental equipment preparation task contains no time & material labor fee. Review the Time and Material tasks vs. Contract Tasks section for more details.

- The **Repair Work Order** type was created for general repair tasks. This task type should have a base type of **Time and Materials Service** if repair labor is billed based on the amount of time that was spent by the repair technician.

- The **Sales Contact** type was created for tasks created by the sales person to track sales contacts. This type is configured with a base type of **Sales** since a sales contact type is not billed to the customer. Review the Using Tasks as a Contact Manager section for more details on using the Task module as a contact manager.

- The **Sharpen Blades** and **Standard Service and Oil Change** types were created for common tasks that are billed using a standard fee. A task with a set fee should have the base type set to **Contract Service.** This allows the user to set the time and cost allocated to a standard task such as sharpening blades or changing oil. Review the Attaching a Task to a Service Item section for more details about setting a fixed cost and time to a task.

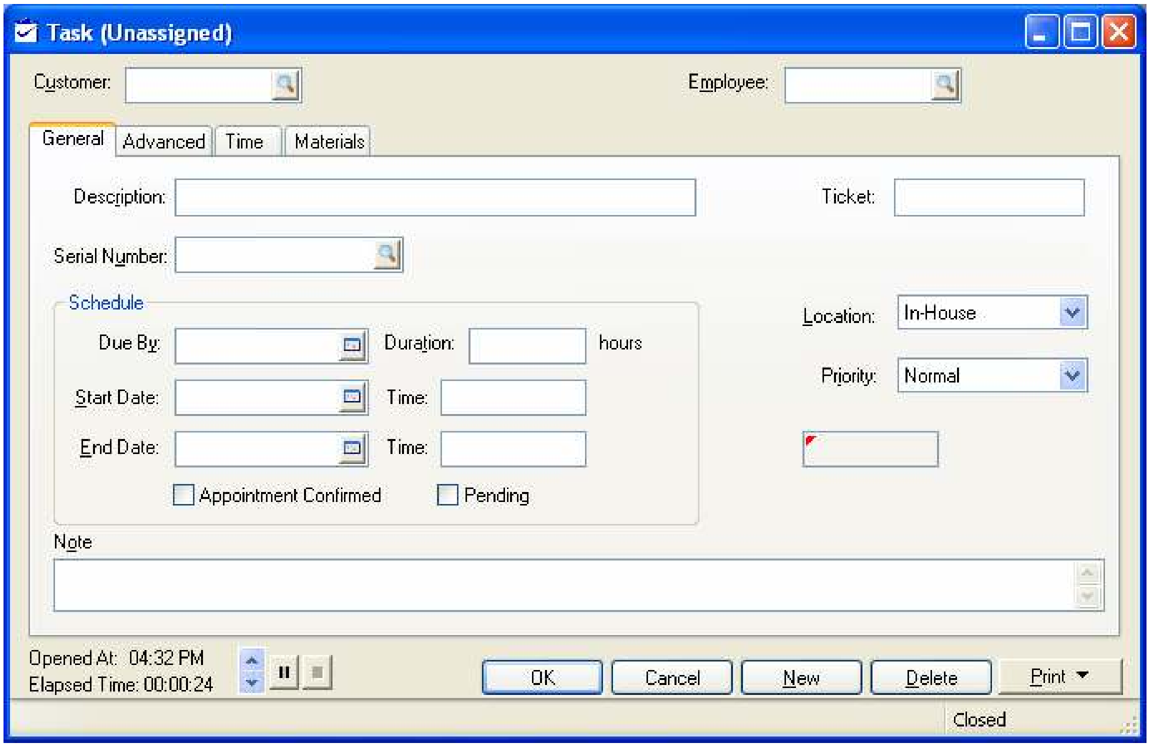
- The **Support Call** task was configured to be used for support calls that are tracked for history. The base type was set to **Phone.** Review the Using Phone Tasks for more details.

- The **Warranty** task was created for tasks that are not billed. The base type was set to **Warranty**.

These types are only examples. A company's task types will vary drastically based on the way the Task module is used within the company.

The default values should be set for each task type in a similar manner as the default customer settings within the customer folder list in Sales > Options. Complete the following steps to set the default values:

Select a task type and click on the **Edit Defaults** button to open the following window:



The **Task** window appears very similar to the task entry window but is used only to enter default values. Any data you enter into any of the entry fields will default the next time you create a new task. Review the Creating an Open Task section for more details on individual fields.

Suggested Task Default Settings

General Tab

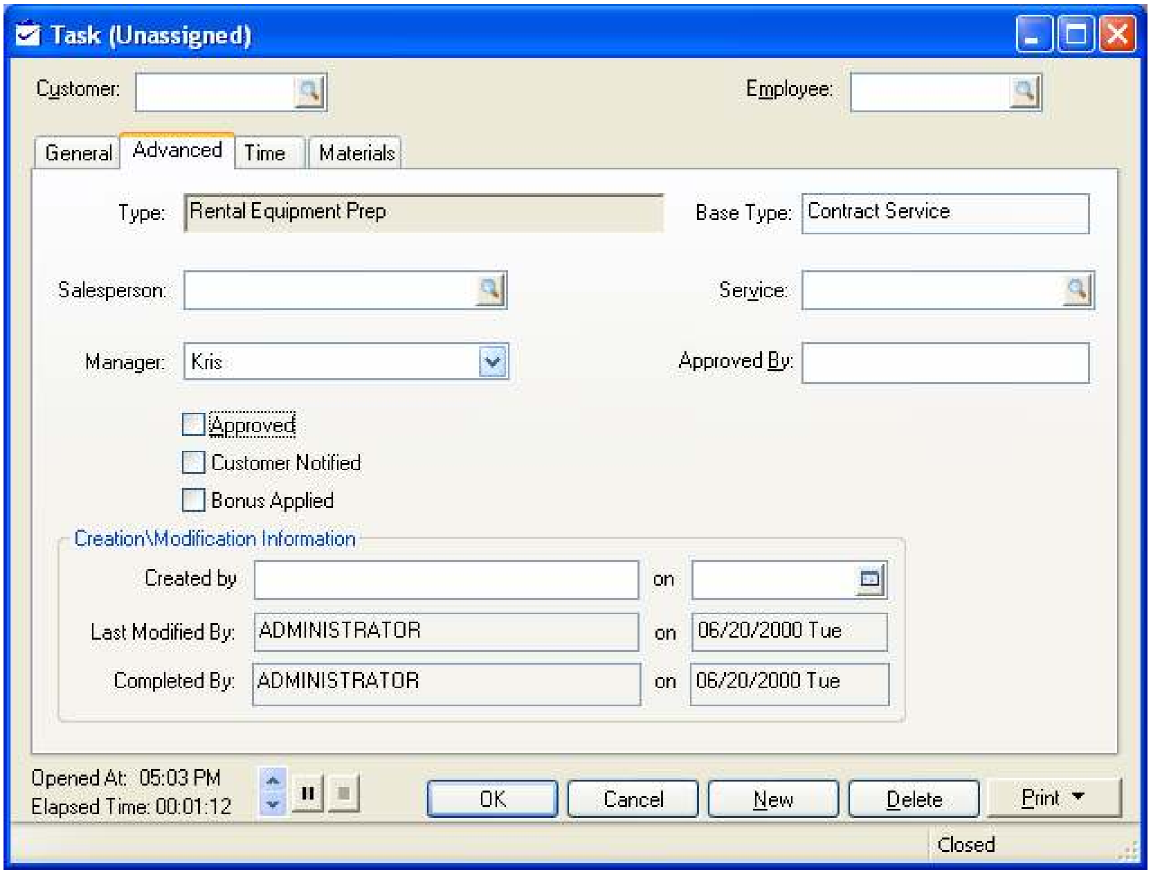
- Most of the **Schedule** entries should be kept blank. The **Duration** field can be set if the average time spent on the selected task type is somewhat consistent. Enable the **Appointment Confirmed** and **Pending** options only if a new task should default to a confirmed or pending status.

- Set the default **Location** option to either **In-House** or **On-Site** based on the standard location for this type of task.

- Set the standard **Priority** level. Set to **Normal** if there is no standard **Priority** level.

The remainder of the general tab fields can remain blank.

Advanced Tab



Enter a customer ID in the **Customer** field. If the task does not relate directly to a customer leave the field blank or enter a generic customer ID. For example, if the **Rental Equipment Prep** tasks are not billed to a customer, the **Customer** ID could be set to a generic customer or company name (example: QUAHAR – Quality Hardware). This allows the user to bypass the required **Customer** ID entry when creating a new task.

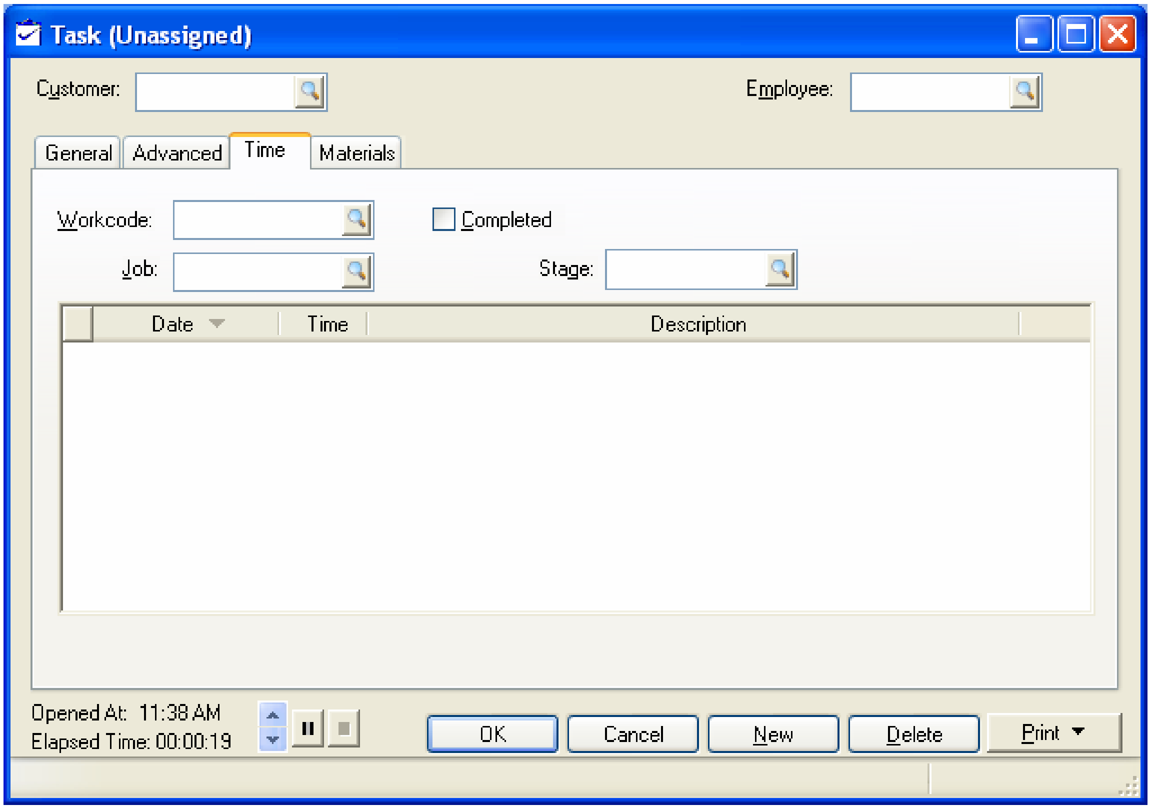
The **Manager** setting should be set to the appropriate manger that approves or manages the task. Review the Approving Tasks section for more details on approving tasks before billing.

The **Service** setting is the inventory item used to bill the task. This entry should be an inventory item classified as **Service**. Keep this entry blank if the inventory item used to bill the task is not consistent. Review the Billing a Project or Task section for more details on this entry.

The **Approved** switch should be disabled unless this task type does not have an approval step. Review the Approving Tasks section for more details on approving tasks.

The remainder of the fields on the Advanced tab should be kept blank or unchanged.

Time Tab



The **Work Code** setting should contain the default work code used by the employee when entering time into the task. This setting should be populated since the work code should be consistently associated with the task type.

The **Job** and **Stage** settings should only be populated if the task always relates to the same **Job.** These entries will only appear if the job costing module is installed. Review the **Job Costing** documentation for more details on job costing. These entries are blank within the default settings under normal situations.

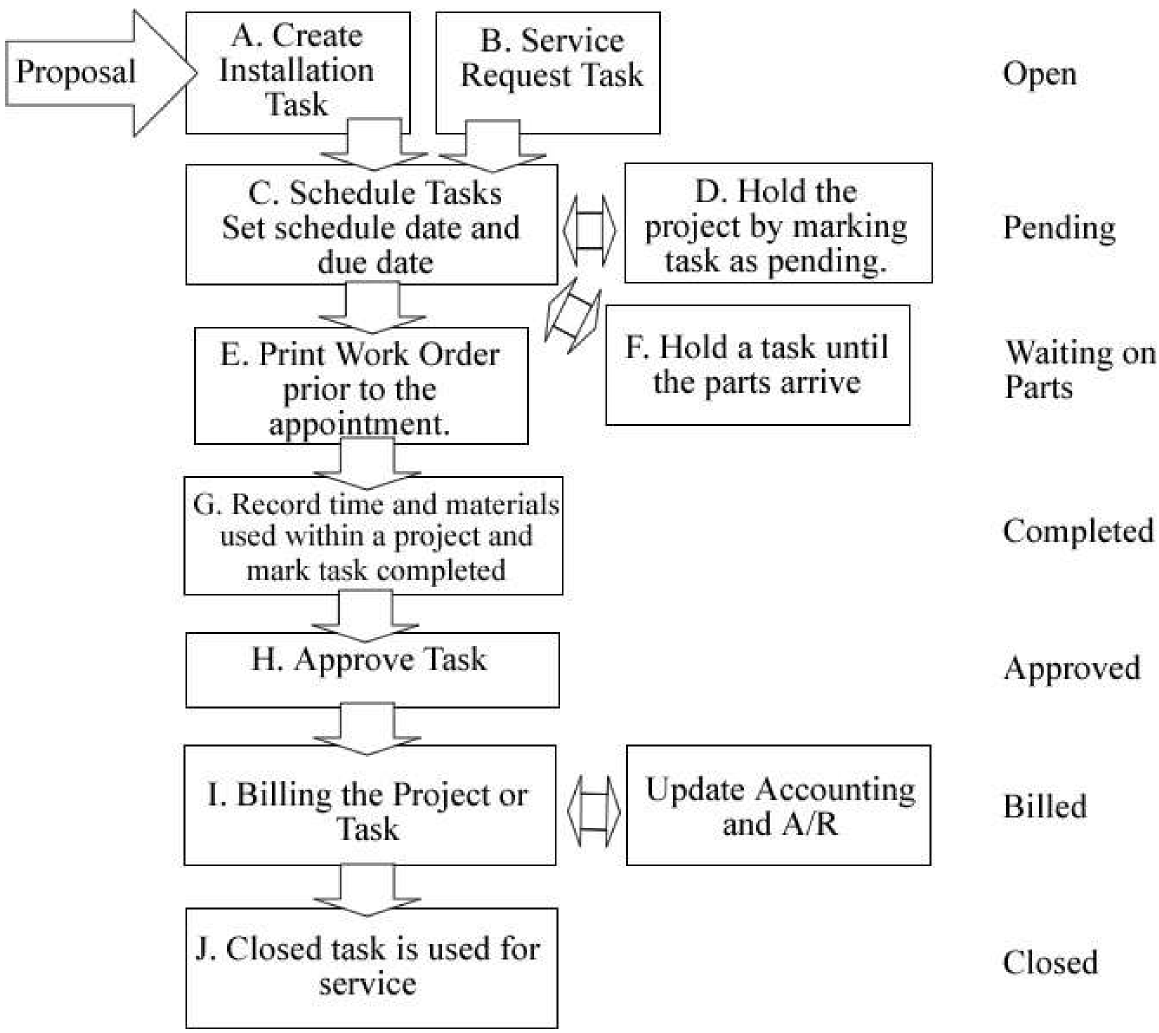
The remainder of the settings on the **Time** and **Materials** tabs should remain blank.

Using Tasks as Work Orders

Using a task as a work order to schedule, track, and invoice service requests or projects is a common

The following flow chart depicts the typical flow of information within the EBMS work order system using tasks.

Status Settings



A. A service task can be created from an inventory item that is entered within a sales order or a proposal. The user is prompted to create tasks when the **Process > Create Sales Order** wizard is launched from the proposal menu if service inventory codes are contained within the quote. The **Enter tasks for this item** option within an inventory service item must be enabled to create tasks using the wizard. The user will be prompted to create tasks within a sales order if a service inventory item containing a task type is entered within the SO. Review the Attaching a Task to a Service Item and the Creating a Task from a Proposal or Quote sections for more details.

B. A task work order can be created at the time of the service request and attached to a sales order at the time the service is billed. Review the Creating an Open Task section for more details.

C. The task module contains scheduling tools that allow a company to schedule individual technicians or crews. Review the Scheduling Tasks sectionfor more details

D. A task can be put "on hold" by marking a task as **Pending**. This feature is used to hold a service work order rather than scheduling or completing the task.

E. Technicians often use a printed work order when a computer is not convenient. The work order can be used to track parts, record labor, and make notes. The work order also includes a bar code that is useful if scanners are used. A variety of work order forms can be generated from the task module. Review the Printing Tasks and Work Orders section for printing options.

F. A task or work order may be put on hold if the technician is waiting on parts or materials to complete the task. Review the Waiting on Parts or Materials section for more details.

G. Record the time, parts, and details about the project. Mark the task completed when the project is completed. Documenting a task is valuable for tracking parts, managing labor, and maintaining a historical record about the project. Review the Recording Parts and Materials section and Recording Labor and Completing the Task for more details.

H. The approval is an optional step used when a manager is required to review some or all work orders before a task is billed. Review the Approving Tasks section for more details.

I. Billing the project or task is done after a task is completed and approved. Review the Billing a Project or Task section for more details.

J. Task history can be reviewed at any time supplying the user with maintenance history for a customer, piece of equipment (serialized item), or job. Review the Reviewing Task History section for more details.

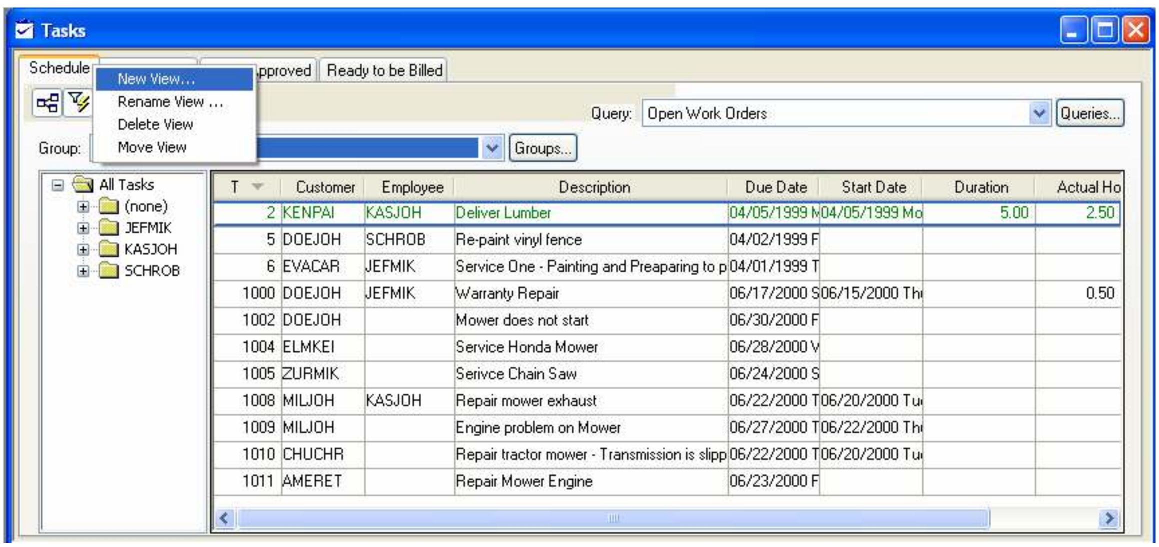
Creating Multiple Views

The task module includes some very flexible tools to view tasks or work orders. These views allow the user to manage and schedule tasks quickly and efficiently. The task windows can be configured to list tasks in a variety of views including the following:

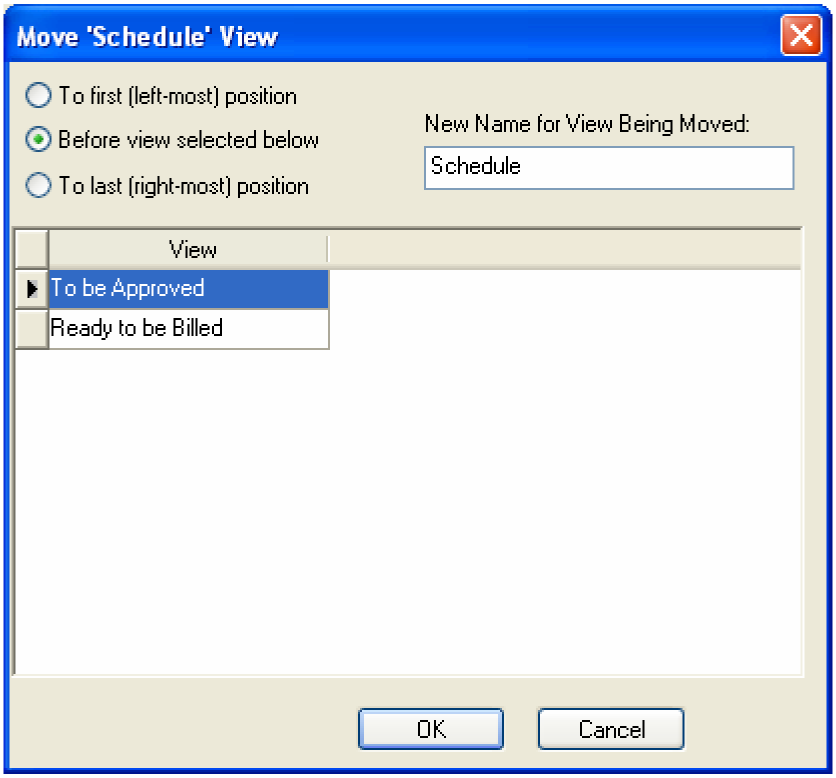
- List tasks by employee to manage a specific employee's work orders
- List tasks by status to manage the task from start to finish
- List tasks by date to assist with scheduling
- List tasks that are pending or are waiting for parts

Tasks can be listed, queried, or grouped by any field within the system.

The main task view window is launched by selecting the **Task** option from the **Task** menu as shown below:



Each view can be labeled for specific purposes and each contains a user defined **Query** and **Group**. Right click on the tab of an existing view to open the context menu as shown above. Click on the **New View** to create a new tab view. Tabs can be moved by selecting the **Move View** option dialog as shown below:

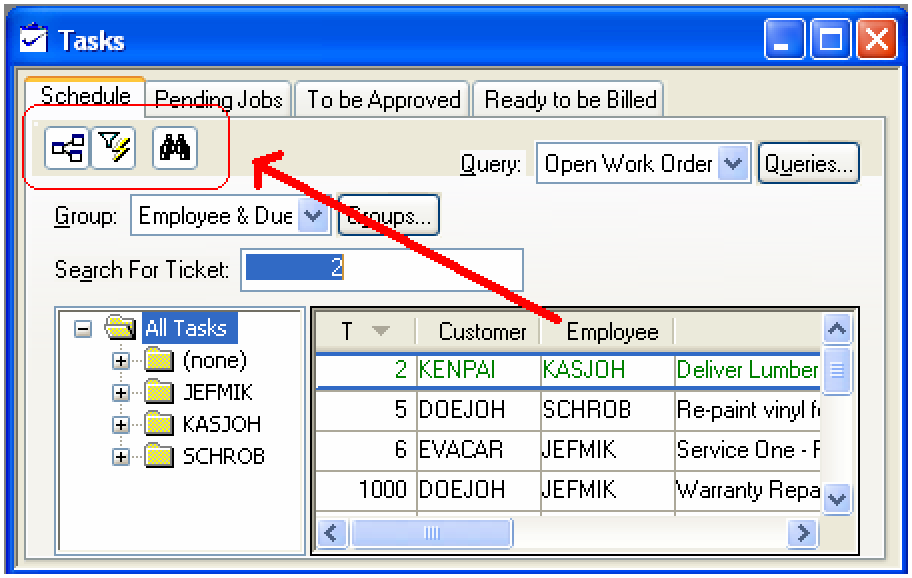


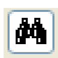
Click on the any of the **View** tabs listed to move the tab to the left of the selected **View**. Click on the first or last option to move the tab to the far left or far right position of all the tabs.

Select the **Delete View** option to remove a view tab. This option does not remove any information from the system. The **Delete View** only removes the list configuration.

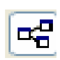
The benefit of creating multiple views is that it allows the user to switch from one view to another quickly. The software does not need to reload and group information each time a new view is desired.

Each view needs to be configured to list and group information in the desired format. There are 3 main options to set within each view. These 3 options can be activated by clicking on the specific toolbar icon as shown below:



The **Search** icon  is used to show the **Search** field. The user may click on a column within the task list to identify the column that is being searched. A specific task can be located by typing information into the **Search** field in a similar manner as other lookup lists.

The **Query** icon  is used to limit the view to tasks that meet the query or filter condition. Review the following section - Creating Queries for details on creating **Queries**.

Click on the **Group** icon  to group tasks in groups. If the **Group** option is enabled, the system loads all the applicable tasks into memory. It is important to disable this option if a large number of tasks are being listed.

These views are maintained for each user within the Windows Registry. The view settings must be set within each computer.

The following view combinations are common settings used in a variety of companies:

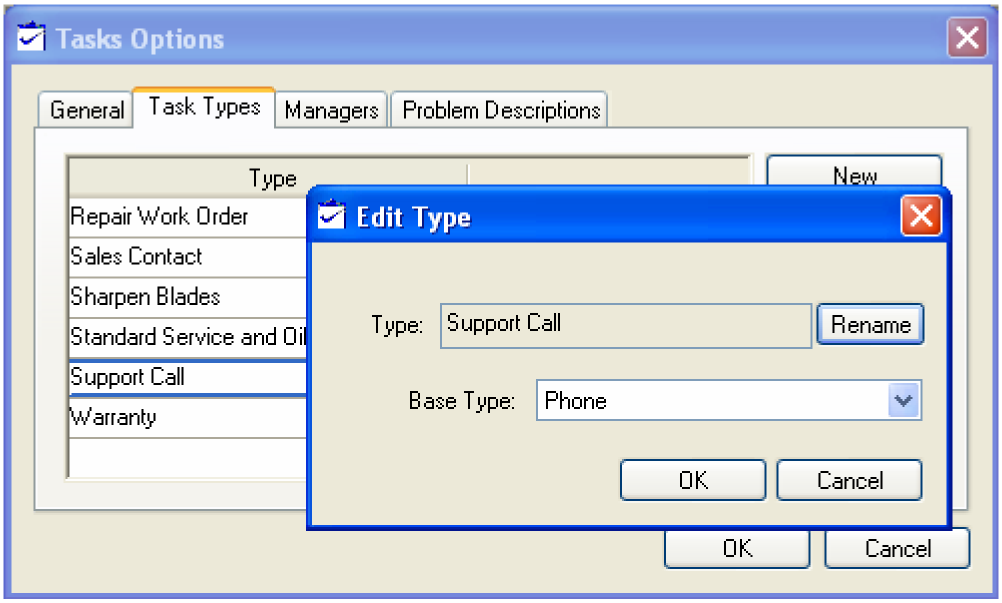
Group Label	**Query Setting**	**Group Setting**	**Comments**
Schedule	Open Work Orders	By Employee and Start Date	This is an excellent view to use to schedule multiple technicians or employees
My Tasks	Employee & Status	Start Date (or Due Date)	This is a good view to use for individual schedules
Waiting for Parts	Pending & Waiting for Parts	None	Review the Waiting for Parts or Materials section for more details
Overdue	Overdue (and manager)	Employee, Due Date, or Customer	This view is an excellent method to review tasks that are past due quickly.

To Be Approved	To be Approved	Customer (or task Type)	Review the Approving Tasks section for more details on creating this view.
My Query	My Query	(varies)	This query is used to allow the user to quickly change the query for specific uses.
Status (Customer View)	Customer No Query if used in customer tab	Status	This view is an excellent setting to use in the task tab of the customer.

Using Phone Tasks

The phone task type is used for support or sales calls that are completed at the time the task is created. The task time is metered at the time the task wizard is launched until the task wizard is completed. This task type is to log phone calls with customers. Complete the following steps to create a phone task:

1. A phone task such as a support call log should have a **Base Type** of **Phone**. Go to **Task > Options > Task Types** and click the **New** button.



2. Enter a brief task **Type** description of the task type and set the **Base Type** option to **Phone**. Click the **OK** button to save.

3. Select the task type from the task type list and click on the **Edit Defaults** button. Set all the appropriate defaults for the phone task type. Some suggestions are listed below:

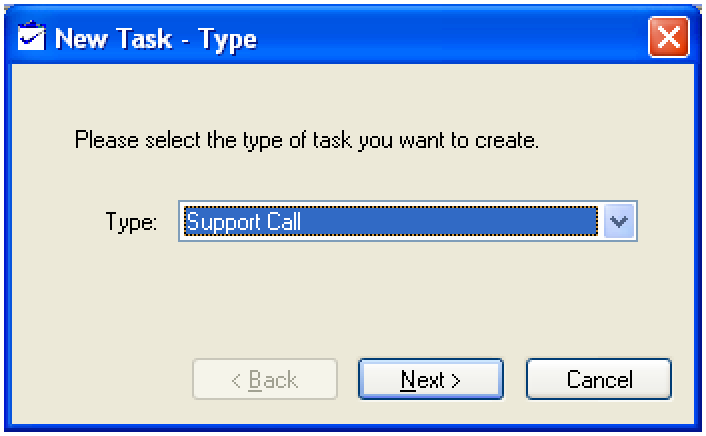
   a. **General** tab – Set the **Location** and **Priority** settings accordingly

   b. **Advanced** tab – Set the **Manager** and **Service** item if applicable. Review the Approving Tasks section for more details about the **Manager** option. Review the Attaching a Task to a Service Item for more details on the **Service** item settings.

   c. **Time** tab – Set the default **Work code** for phone tasks. Enable the **Completed** option if the task should be marked completed after the phone call.

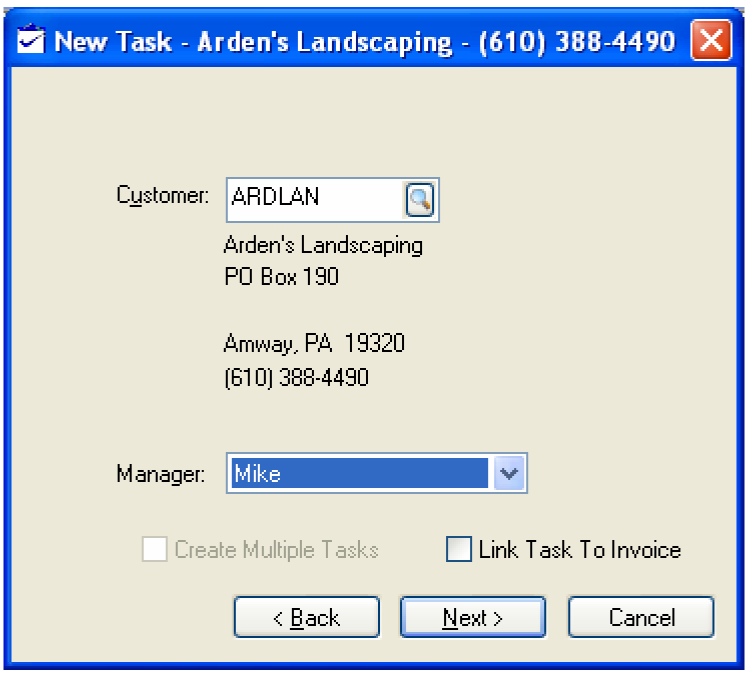
   Click on the **OK** button to save the settings and options.

4. Launch the new task wizard from the task list. Review the Creating an Open Task section for more details on launching the new task wizard.

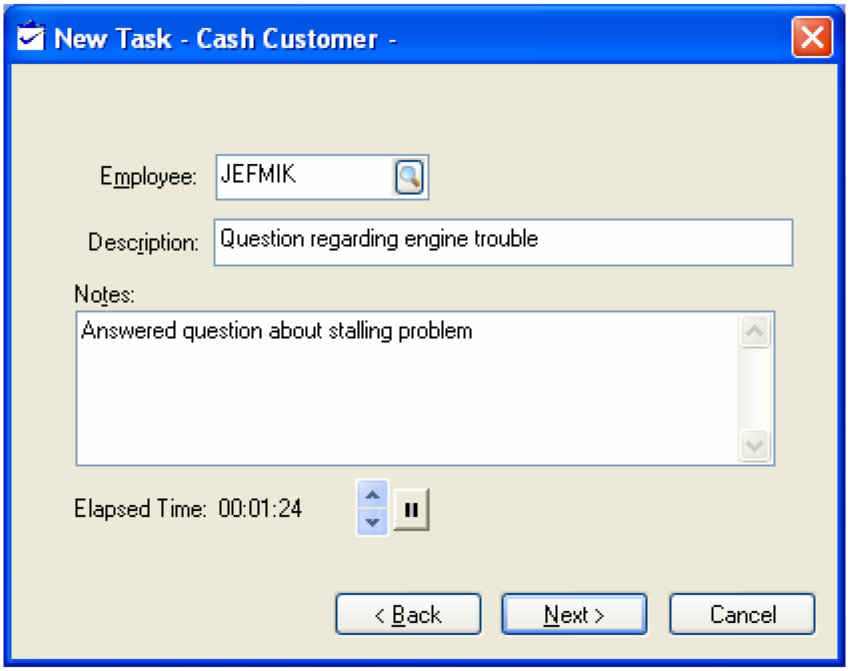


5. Select the phone task **Type**.

6. Click the **Next** button and enter the **Customer** information.

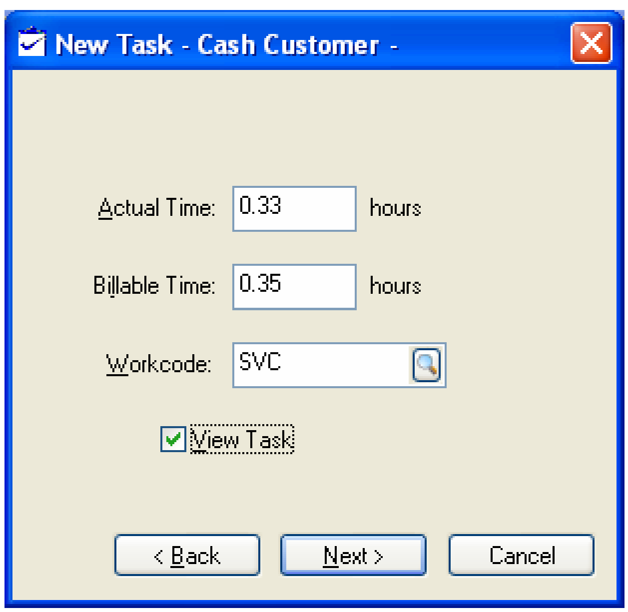


7. Enable the **Link Task To Invoice** option if the phone support is invoiced. Click **Next** to continue.



8. Enter a brief **Description** of the phone call. Add any pertinent **Notes**. The **Elapsed Time** is calculated from the time the task wizard is launched. Click the up or down arrows  to increase or decrease the timer. Click on the pause button  to pause the timer. Click on the **Next** button when the call is completed.

9. The **Actual Time** value is set to the time calculated from the new task wizard timer.



10. Enter the **Billable Time**. The **Work code** should default to the code entered in the task type defaults. Review the Creating Task Types and Defaults section for more details on setting defaults.

11. Enable the **View Task** option to open the task after the wizard is completed. This option should only be enabled if additional information is required on the task.

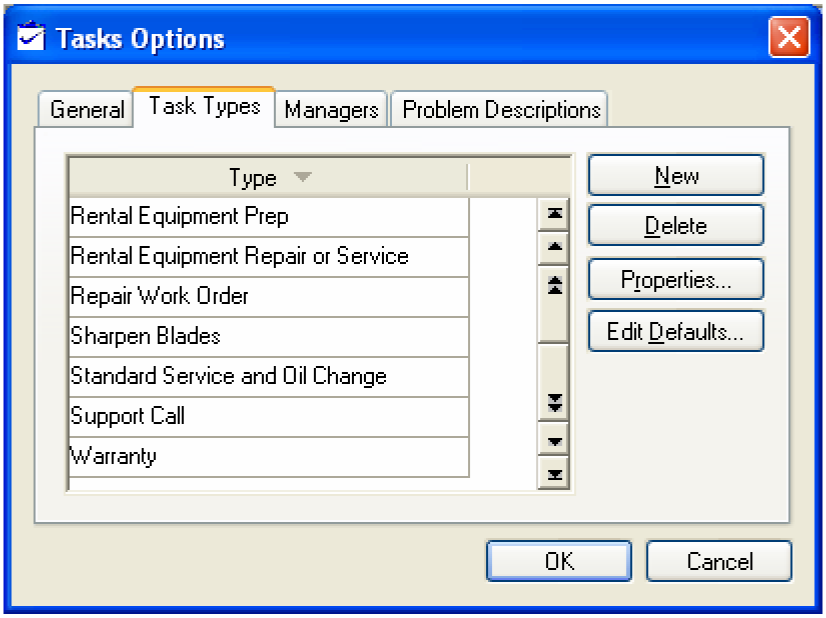
Enable the **Completed** option within the defaults settings of the task type to mark every task as completed when the wizard is finished. Review the Creating Task Types and Defaults section for more details about entering default values.

Using Tasks as a Contact Manager

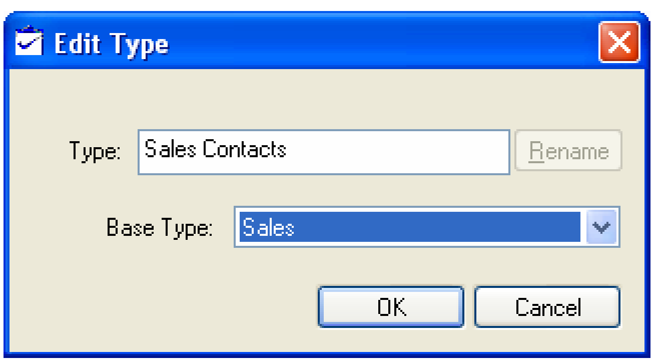
The task module within EBMS can be used to log contact details with a customer. This module can be used in place of or in conjunction with software products such as MS Outlook, Act, or Goldmine.

Setup a sales contact task type by completing the following steps:

1. Go to **Tasks > Options** and click on the **Task Types** tab.

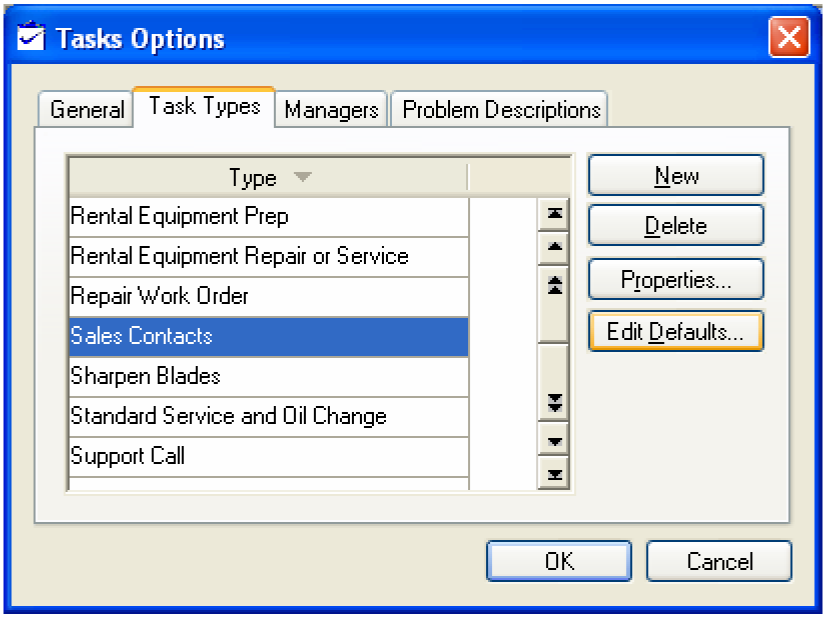


2. Click on the **New** button and create a sales contact type:

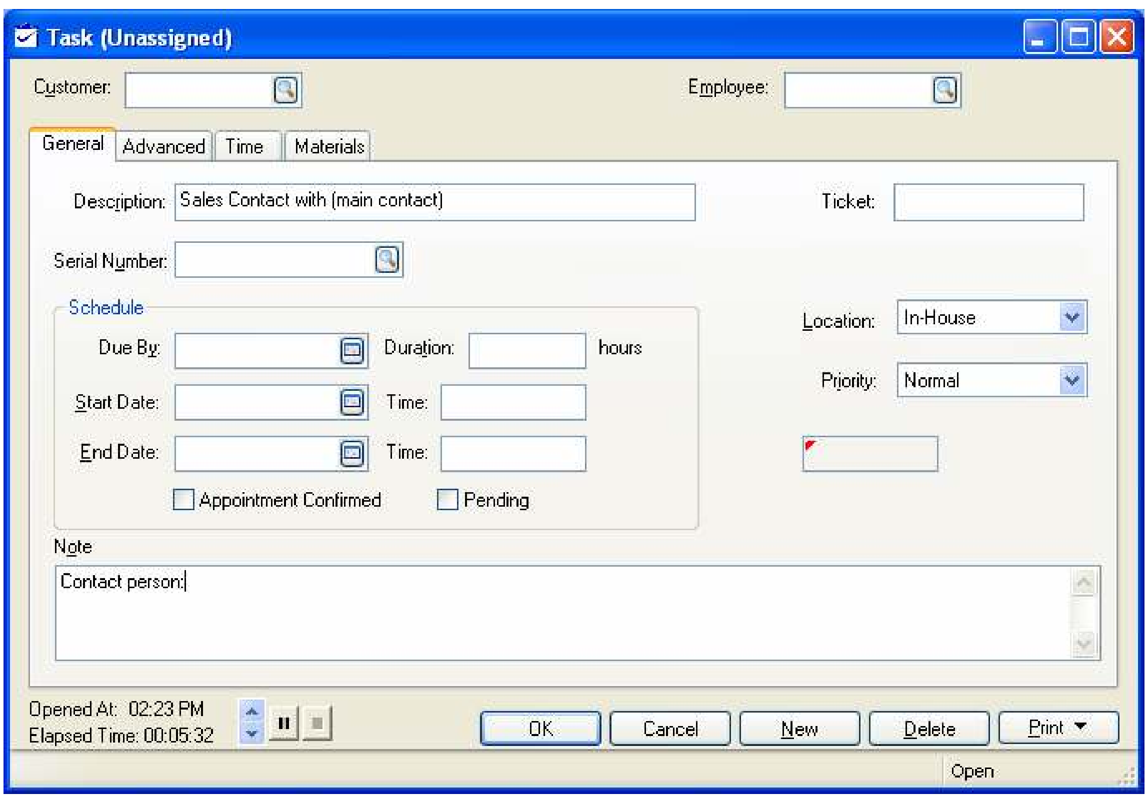


3. Enter a **Type** ID to identify the sales contact type.

4. Change the **Base Type** setting to **Sales** or **Phone**. The **Phone** type should only be used if most sales contacts are made via phone and the task timer should be active as soon as the task wizard is launched. Review the Using Phone Tasks for more details. Use the **Sales** base type to record sales contact other than phone calls.



5. Select the new sales contact type and click on the **Edit Defaults** button.



6. Set the following default settings for a sales contact task:

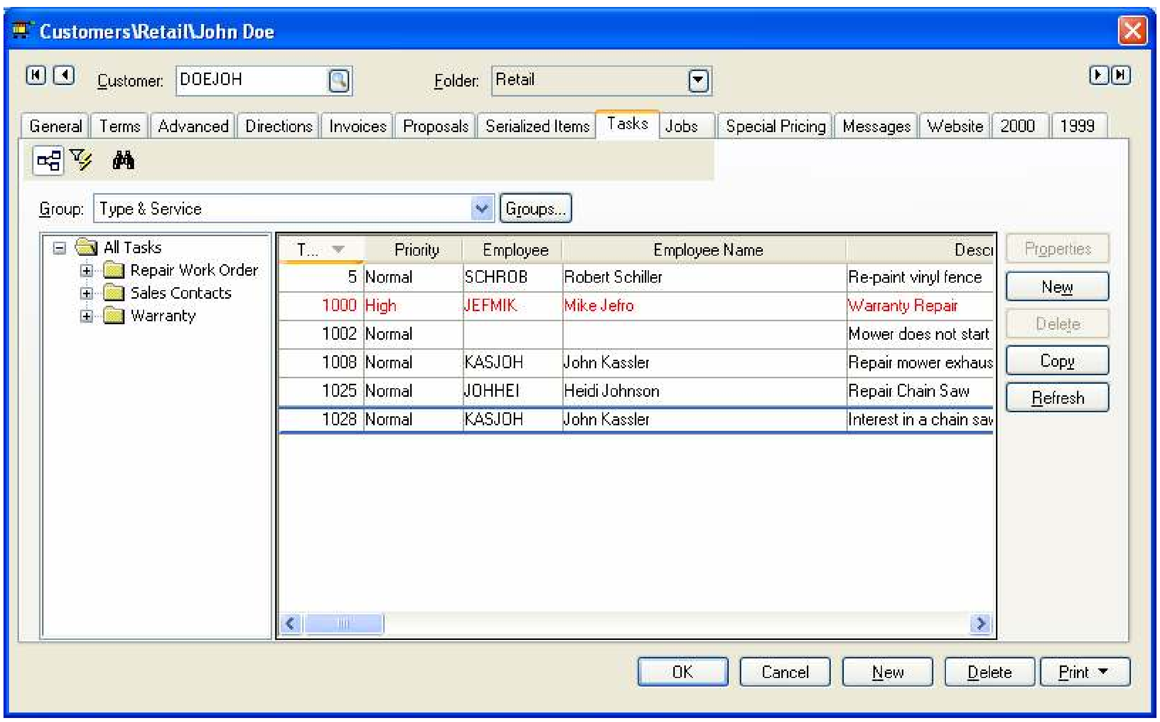
   a. **General** tab: Set the **Location** and **Priority** settings according to the most common sales contact task. The user may wish to enter a default description with prompts within parentheses. Enter any default notes or labels for standard information.

b. **Advanced** tab: Select the sales manager in the **Manager** setting. Enable the **Approved** option unless sales contact tasks require approval. Review the Approving Tasks section for more details on the manager setting and approval option.

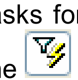
c. **Time** tab: Enter the sales work code setting if the work code used to record sales time is consistent. Review the Recording Parts, Labor, and Completing Task section for more details on the work code setting.

d. There are not default settings that should be set within the **Materials** tab

A new sales contact task can be launched from the main task window or from within a customer record. Review the Scheduling Tasks section for more details on using the main task window (**Task > Tasks** from EBMS menu) to schedule sales contacts. Open a customer record to create or edit a sales contact task by going to the **Tasks** tab of the customer.



The task tab within a customer can be configured to query and group the tasks according to the needs of the user. These settings only affect the Windows profile of the local computer and does not affect other computers. The sales person may wish to query the tasks in one of the following ways:

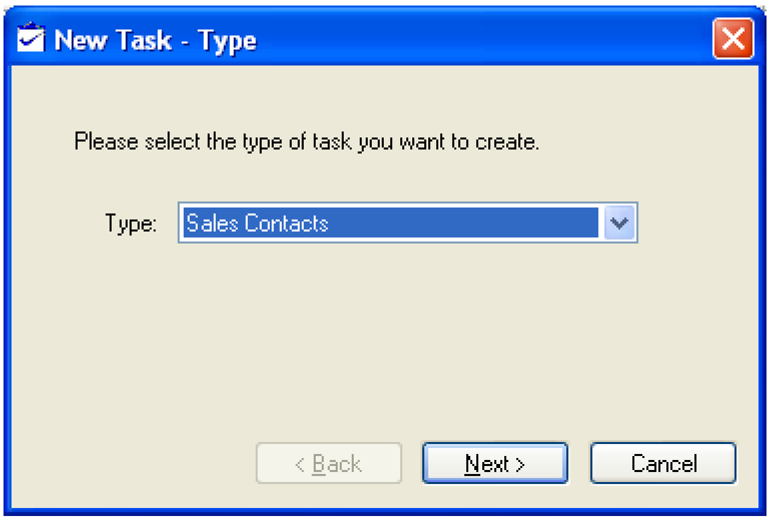
- Select **Status** from the **Query** options. Select Open from the **Status** options to only list the open tasks as shown above.
- Set the **Query** option to **Manager** and select the sales manager to list only the sales contacts
- Disable the **Query** option so all the tasks for this customer are listed. The query option can be disabled by clicking on the  icon above the group setting.

Some common **Group** options used within a customer record are as follows:

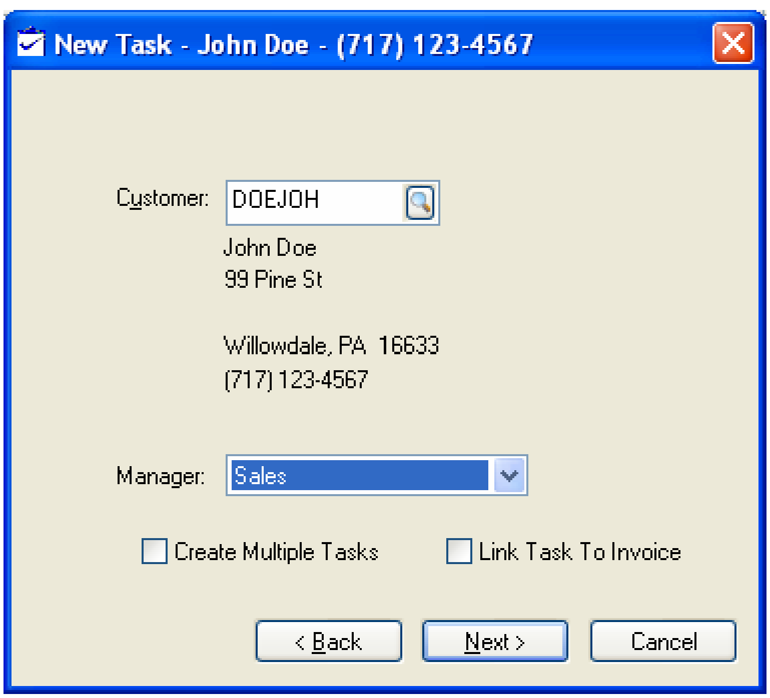
- The **Status** option to list all tasks based on the status of a task. This option allows the user to identify open or pending tasks quickly. Review the Using Tasks as Work Orders for some status options or the Task Status Settings section for details about status options.
- The **Type** option groups tasks based on the task type. See example listed above.

Complete the following steps to create a new sales contact task:

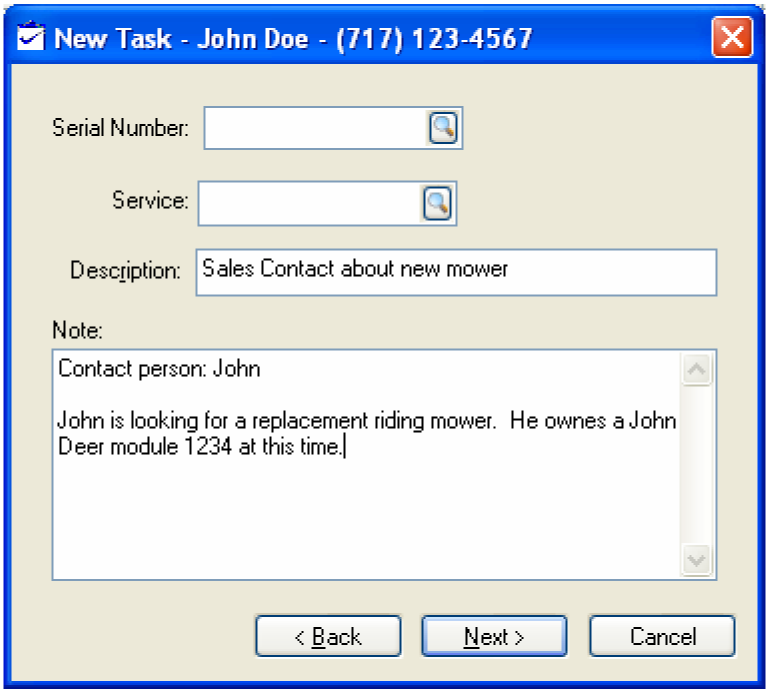
1. Click on the **New** button to the right of the task list within the **tasks** tab of a customer. (Select **Edit > New** from the EBMS menu to launch the new task wizard within the main task window)



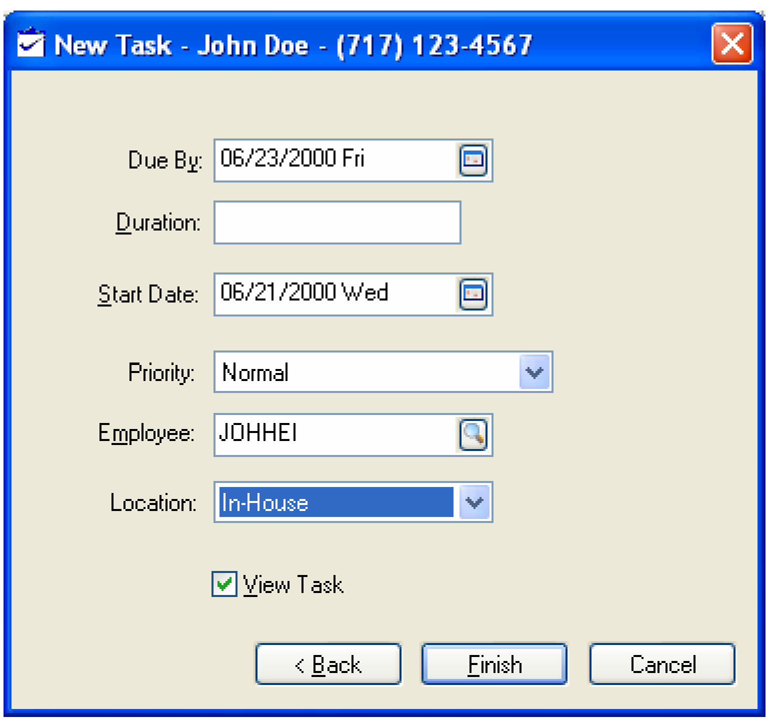
2. Select the sales contact **Type** and click **Next**.



3. The **Customer** ID will default if the new task wizard is launched from the task tab of the customer. Otherwise the **Customer** must be selected. The **Link Task To Invoice** option should be disabled. Click **Next** to continue.



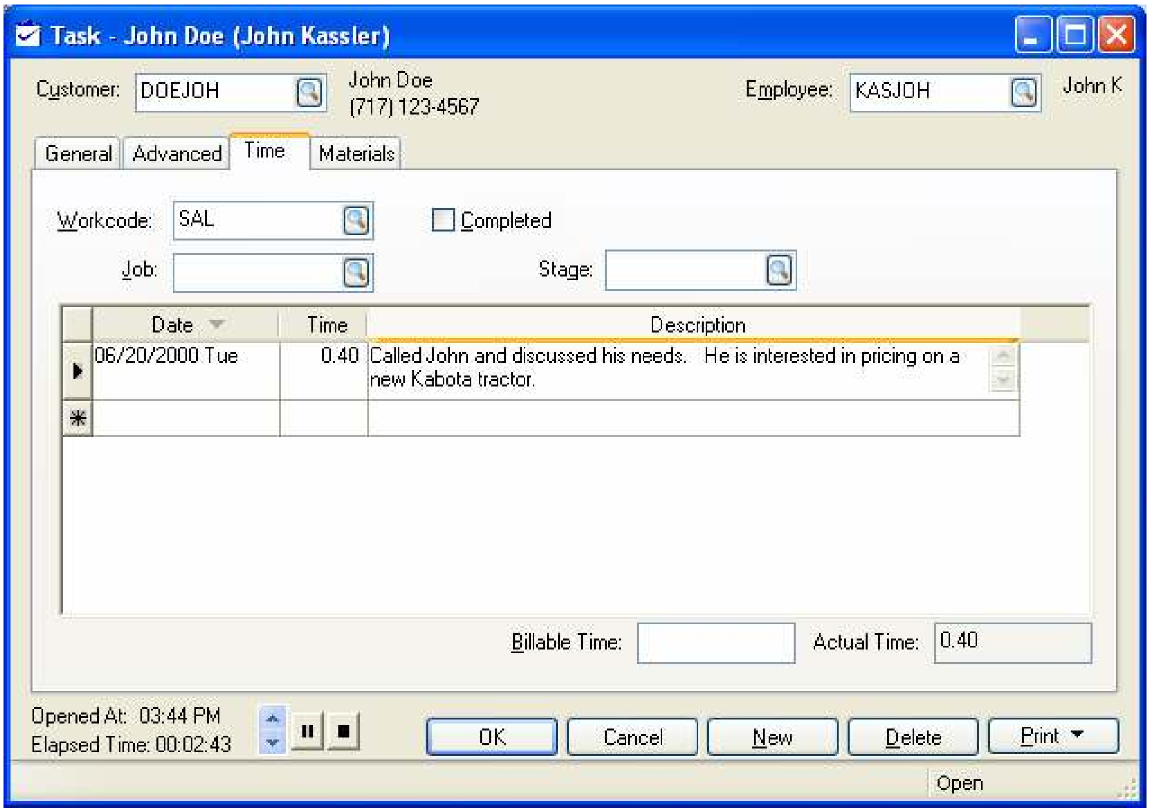
4. The **Serial Number** and **Service** code can be ignored in a sales task. Enter **Notes** about the sales contact and click **Next**.



5. Set the appropriate **Start Date** and **Due By** dates. Review the Scheduling Tasks section for more details on the task date settings. Change the **Priority** and

Location setting if appropriate. Enter the sales person's **Employee ID.** Employee records should be created for all sales persons including those that are not on payroll. None payroll sales people should be group in a separate employee folder group. Review the payroll documentation for more details.

6. Enable the **View Task** option to record open the task after the wizard is completed. Click the **Finish** button and the task will open. Click on the **Time** tab as shown below:



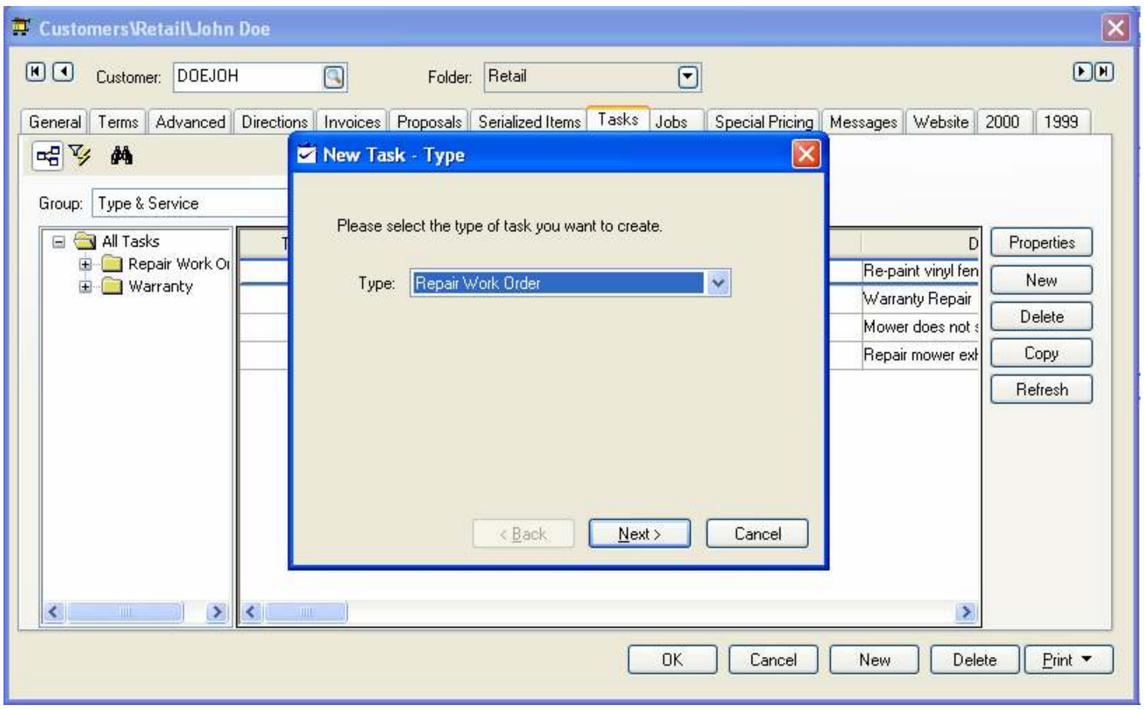
7. Enter the time that was spent on the sales contact and notes on the discussion. Review the Recording Parts, Labor, and Completing Task section for more details on the **Time** tab.

The time entered within the **Time** tab of the task will be recorded within the sales person's timecard. Review the payroll manual for more details.

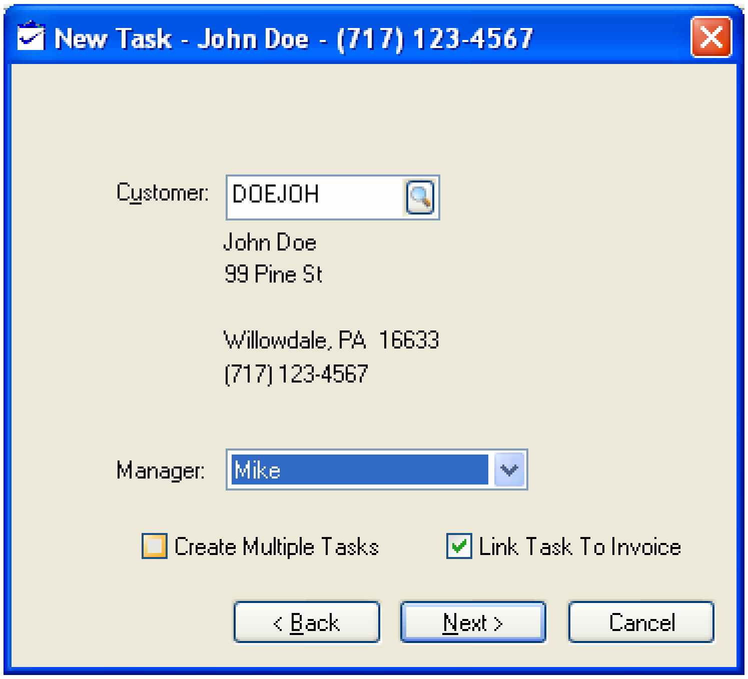
Creating and Scheduling Tasks

Creating an Open Task

A task can be created from any task list. Click on **Edit > New** if the main task window (**Tasks > Tasks**) is in focus. Click on **New** button within the customer task tab (**Sales > Customers > Task** tab) as shown below:



1. Select the task **Type** from the first page of the new task wizard and click **Next**.

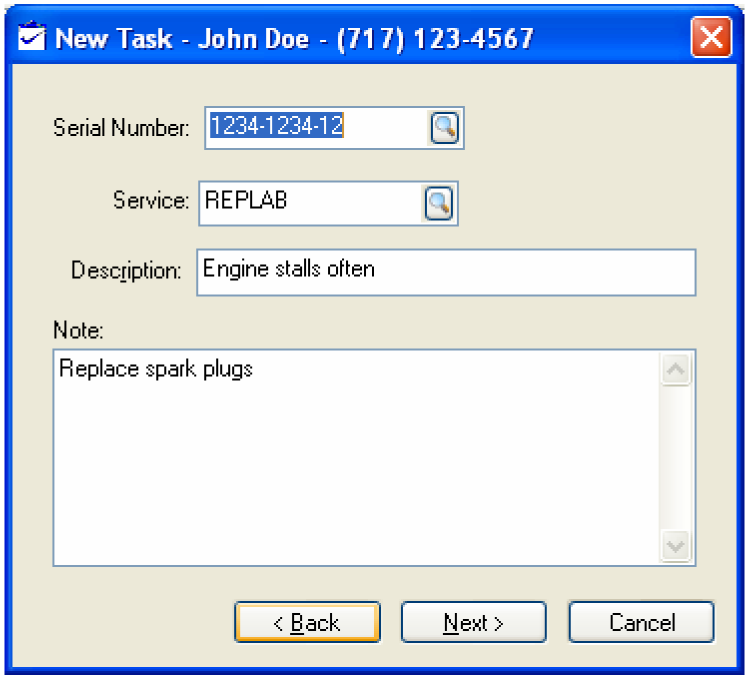


2. Select the **Customer**. Note that the customer defaults to the open customer if the new task wizard is launched from the customer's task tab.

3. Select a **Manager**. Review the Approving Tasks section for more details on the manager.

4. Enable the **Create Multiple Tasks** option to create multiple tasks for the same project. This feature allows the user to duplicate information between tasks. See step **Error! Reference source not found.** for entry details on creating multiple tasks at once.

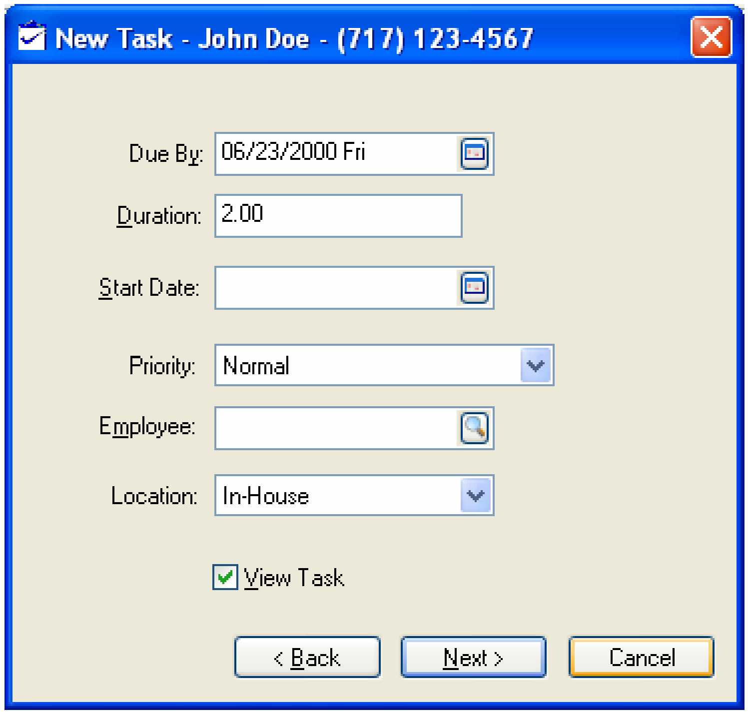
5. Enable the **Link Task To Invoice** option if the task is to be linked to a new or existing sales order or invoice. Disable this option for tasks that do not involve billing. Click **Next** to continue.



6. The **Serial Number** entry will only appear if the serialized item option is installed. Select the **Serial Number** of the equipment being serviced, if applicable. This entry can be ignored if the task or work order is not attached to a serialized item. Review the Serialized Item documentation for more details on serialized items.

7. Enter the **Service** inventory item. This entry can be ignored if the task is not attached to a sales order or invoice. Review the Attaching a Task to a Service Item section for more details on the **Service** inventory item.

8. Enter a brief **Description** of the task. Enter any detailed **Note**s about task or work order and click **Next**.



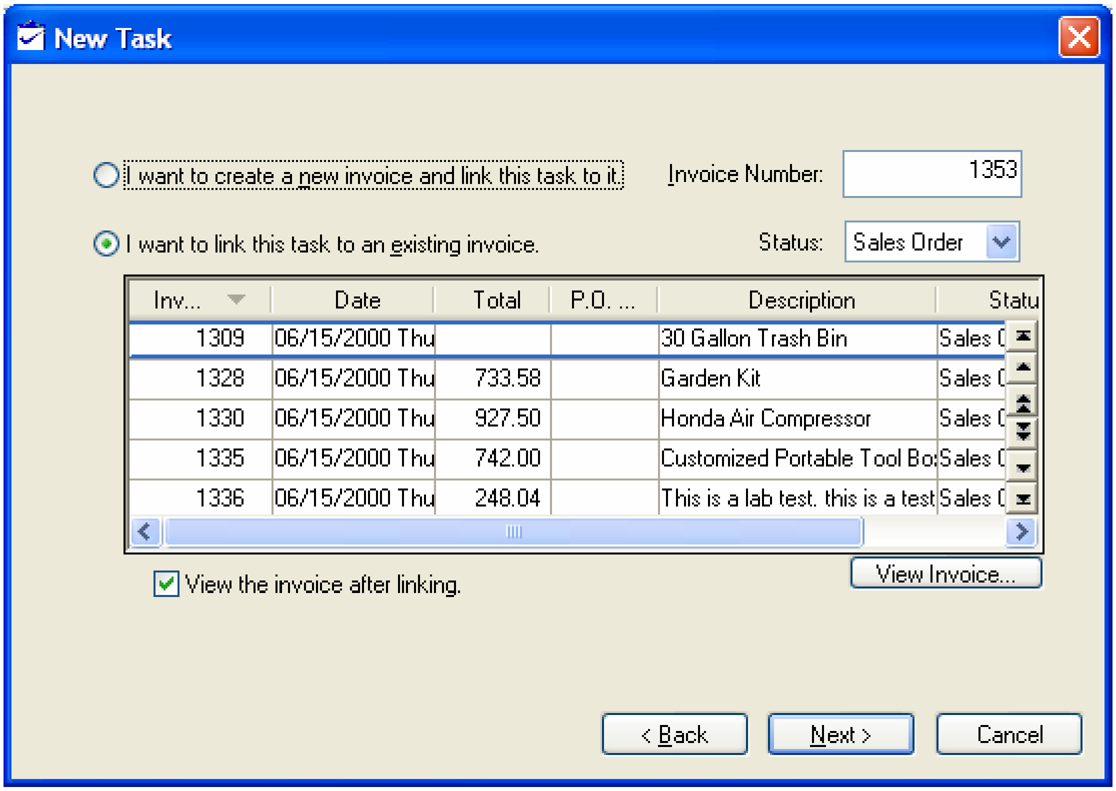
9. Enter the **Due By** date of the task or work order.

10. The **Duration** is an optional entry that is used to determine the amount of time that is estimated to complete the task. The **Start Date** and **Employee** entered can be kept blank if the schedule is determined by another person. Review the Scheduling Tasks section for more details on scheduling tasks.

11. Set the **Priority** and **Location** if applicable.

12. Enable the **View Task** option to open the task when the wizard is complete.

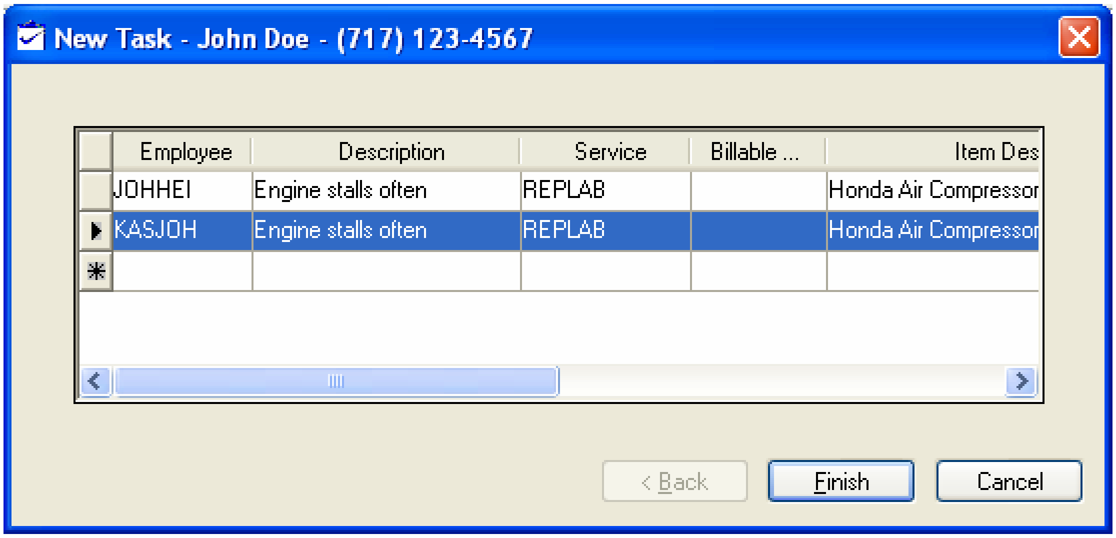
The following wizard page will only appear if the **Link Task To Invoice** option was enabled on the second page of the wizard.



13. Select the first option to create a new sales order or invoice. Select the **I want to link this task to an existing invoice** option to append the item to an existing sales order. The second option allows the user to attach tasks to sales orders or processed invoices by changing the **Status** query. The recommended **Status** query is the **Sales Order** option since additional time can only be appended to sales orders. Click on an existing sales order and click the **View Invoice** button to open an existing invoice or order.

14. Enable the **View the invoice after linking** option to open the invoice after the wizard is completed. Review the Time and Material tasks vs. Contract Tasks section for more details on connecting a sales order to a task. Click the **Next** or **Finish** button to continue.

The following wizard page will only appear if the **Create Multiple Tasks** option was enabled on the second page of the wizard



15. Enter additional **Employee**s, **Description**s, **Service** codes, or other differences and the system will create a task for each line on the task list. Click **Finish** to complete the wizard.

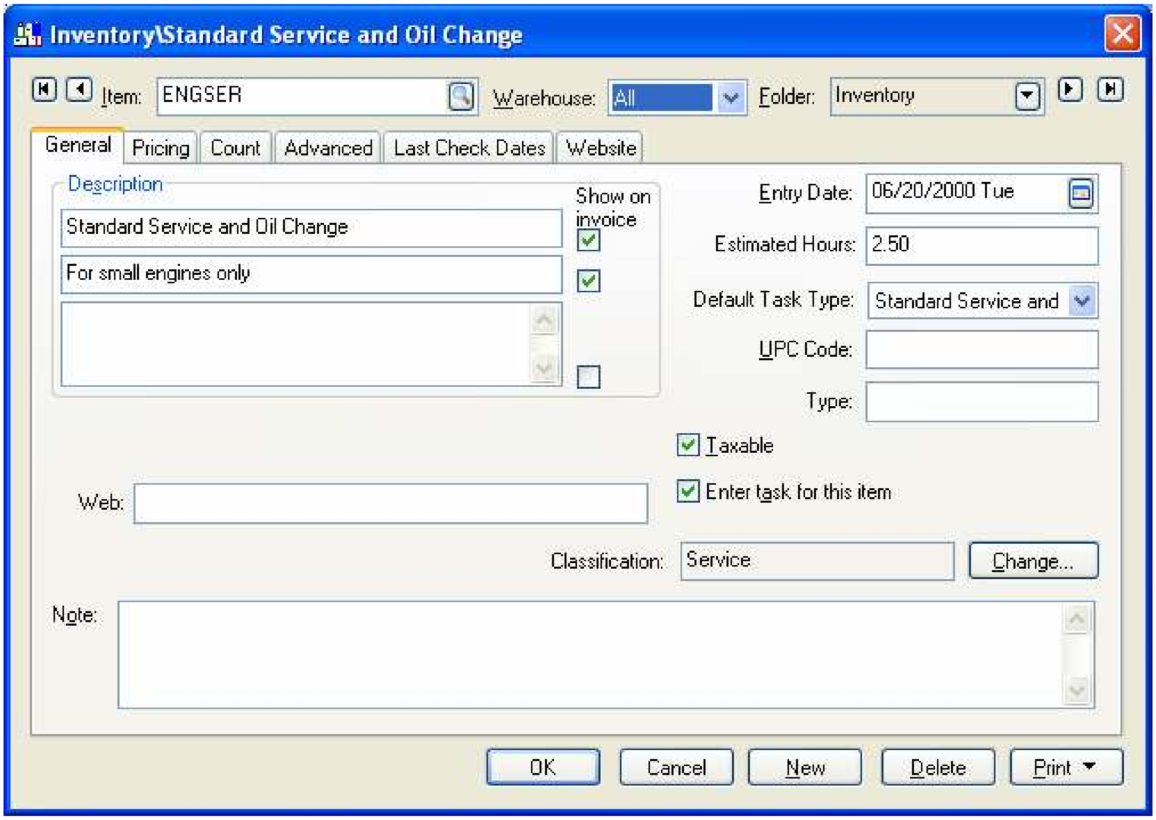
The sales order or invoice linked to the task will be displayed at the end of the wizard if the **View the invoice after linking** option is enabled.

New tasks are normally created with a status as **Open.** Review the Task Status Settings section for details on changing the status of a task.

Attaching a Task to a Service Item

An inventory item classified as a **Service** item is an important component when associating the task to a sales order or invoice. The service item is used to prompt the user to create a task from an invoice or proposal. The service is also the link that translates the billable time to the sales order or invoice. Complete the following steps to attach a task to a service item:

1. Open an existing inventory item that is classified as **Service** as shown below:



Review the Inventory > Using the Inventory Module for Non-Inventory Items > Using Inventory Items to Identify Service Items section within the main manual for more details on creating a service inventory code.

2. The **Estimated Hours** entry is used as the ratio between the billable hours and the sales order. A value of ‘1’ should be entered if the billable hours is to equal the quantity within the sales order. For example, if a time and materials work order or task is billed by the hour enter a value of 1 into the **Estimated Hours** entry. Each time the time is changed in the task the quantity would be updated using the **Estimated Hours** value.

   - If the task is created from the sales order the **Billable Hours** within the time tab = Quantity in SO * **Estimated Hours** within the inventory item. Review the Creating a Task from an Invoice section for more details.

   - If the sales order is created from the task the sales order quantity = **Billable Hours** divided by the **Estimated Hours** value within the task. Review the Time and Material tasks vs. Contract Tasks section for more details on creating sales orders from tasks.

3. Enable the **Enter task for this item** option to prompt the user to create a task when this item is entered into an invoice or proposal. The prompt to create tasks will be when the invoice is saved or a sales order is created from the proposal screen.

4. Select the **Default Task Type**. The new task wizard will default to the selected **Default Task Type.**

The service items that have a task type attached will prompt the user to create tasks when a sales order is created from a proposal or when the service item is inserted into a sales order. Review the Creating a Task from a Proposal or Quote or Creating a Task from an Invoice for more details.

Review the Inventory > Using the Inventory Module for Non-Inventory Items > Using Inventory Items to Identify Service Items section of the main EBMS manual, for more details on items classified as service items.

Creating a Task from an Invoice

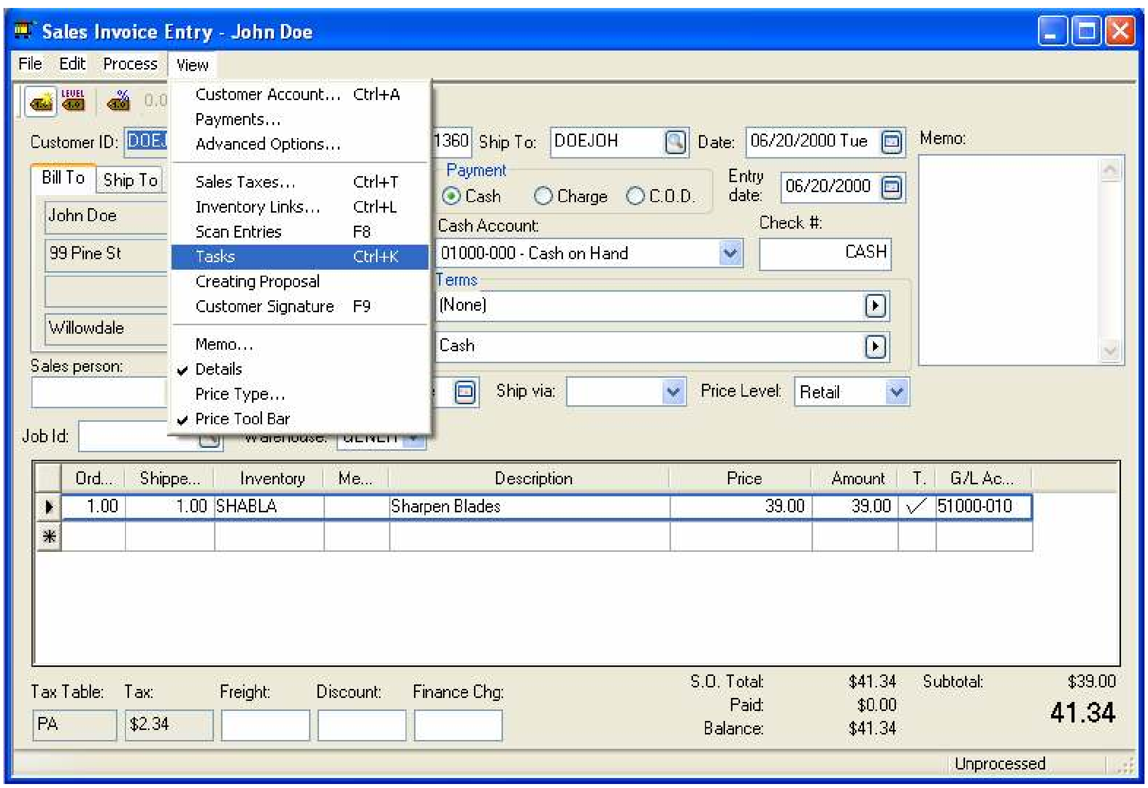
Create Tasks Using a Service Inventory Item

An inventory item classified as a **Service** item can be flagged to create a task when it is entered into a sales order or invoice. The **Enter task for this item** option must be enabled within the **General** tab of the inventory item. Review the previous Attaching a Task to a Service Item section for details.

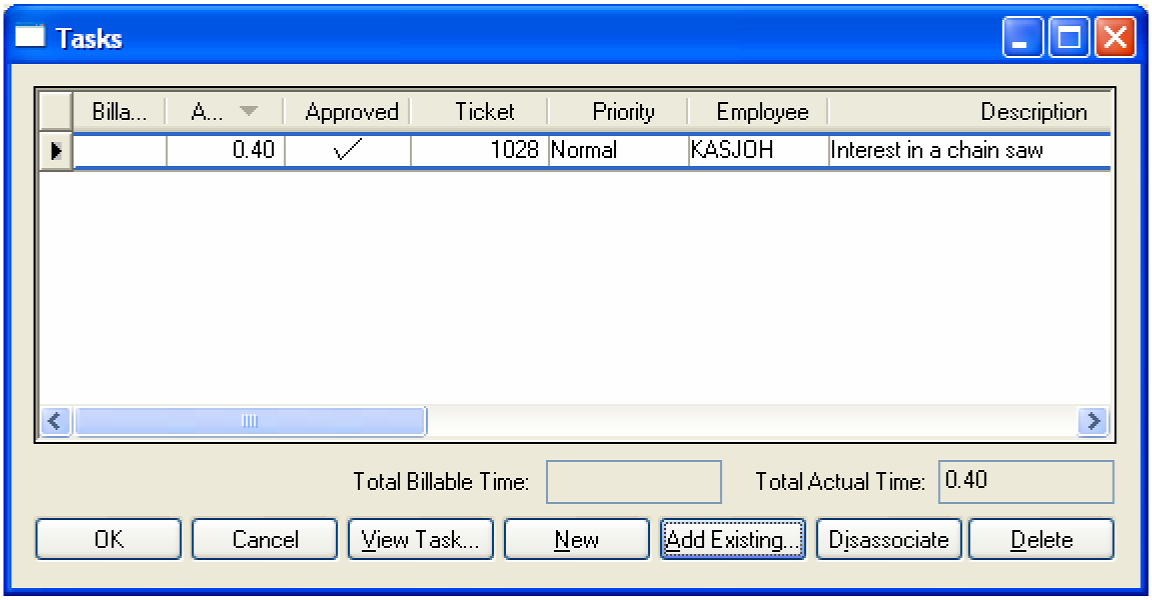
Enter the service item into a sales order as shown in the graphics below. The system will prompt the user to create tasks when the invoice is saved. Click **File > Save** to activate the create task dialog. The dialog will not appear if the task is not attached to the service item or if the service item was entered previously and the dialog was canceled. Review the following section to add, remove, or edit tasks associated with the sales order.

Create Tasks from the Invoice Task List

Tasks can be created directly from the sales order menu. Open a sales order and select **View > Tasks** from the sales order menu as shown below:



The task list dialog lists all tasks that are attached to the sales order. Additional tasks can be attached or created from this window.



Click the **View Task** button to view an existing task.

Click the **New** button to create a new task and attach it to the existing sales order. Review the Creating an Open Task section for more details on the new task wizard.

Click on the **Add Existing** button to associate an existing task to the sales order.

Highlight a task and click the **Disassociate** button to remove the task from the sales order without deleting the task.

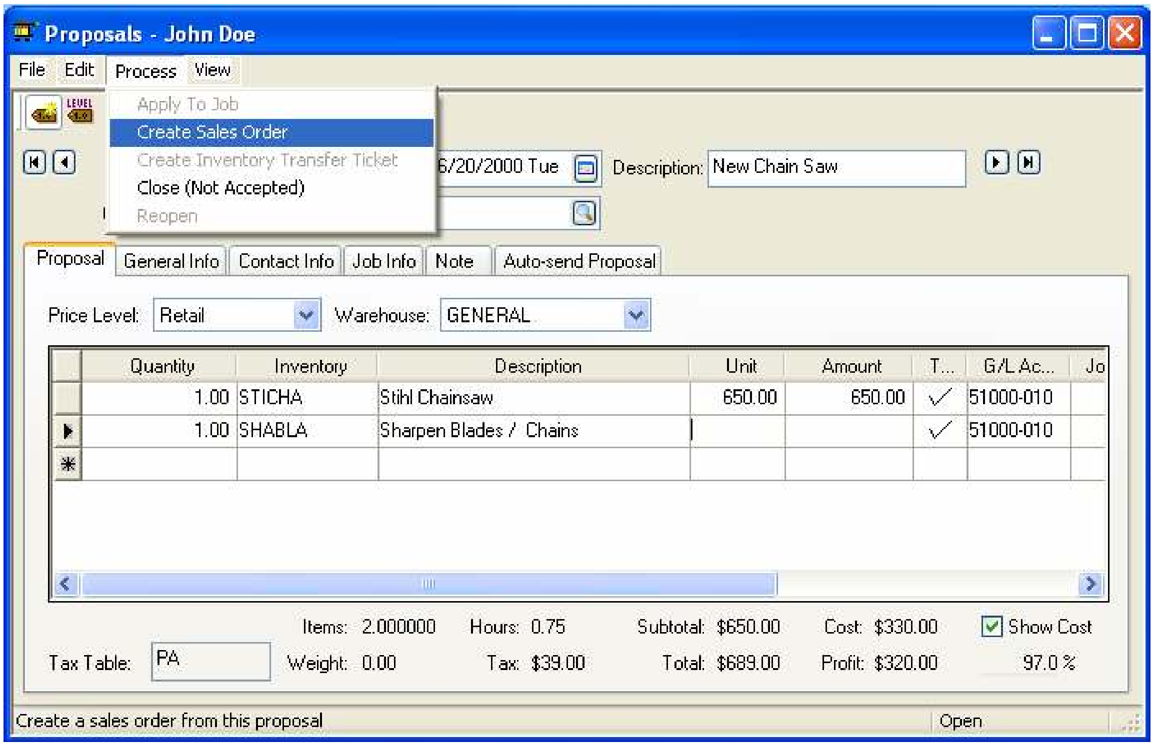
Click on the **Delete** button to delete the task.

Click **OK** to return to the sales order.

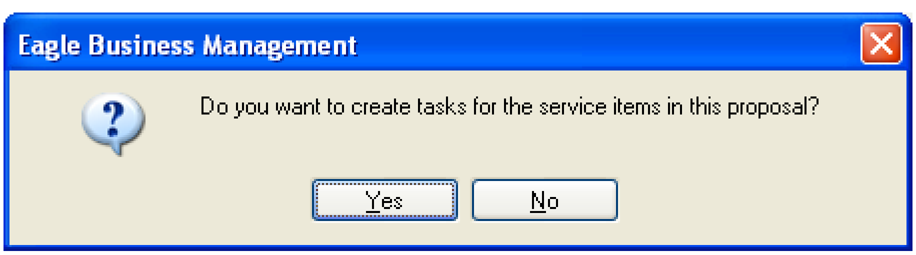
Creating a Task from a Proposal or Quote

Service inventory items within a proposal can prompt the user to create tasks when a sales order is created from a proposal or quote. The service items must have a task type attached to the item. Review the Attaching a Task to a Service Item section for details on creating a service item.

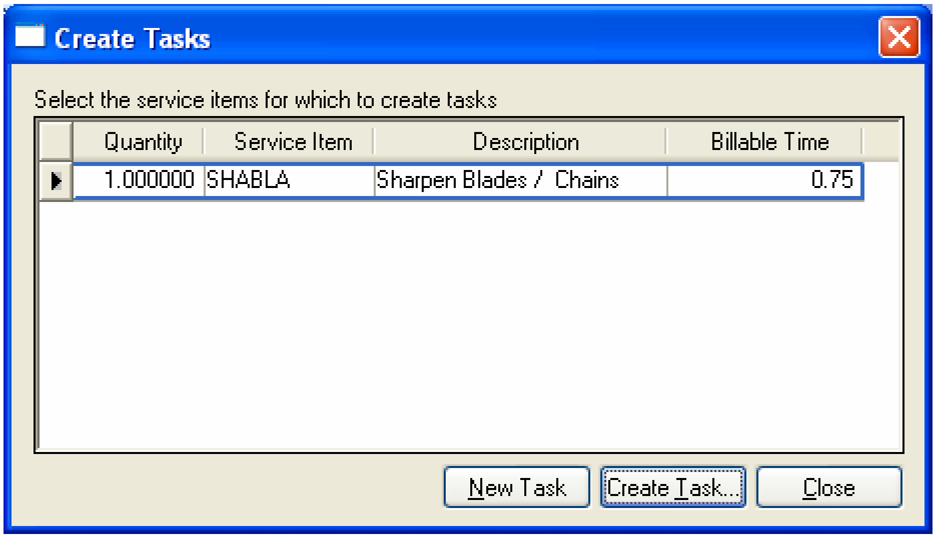
The example below contains a service inventory item (SHABLA) that is connected to a task type.



Launch the **Create Sales Order** wizard from the **Process** menu of the proposal. Review the Proposals > Processing Proposals >Creating a Sales Order section of the proposal documentation for more details on the **Create Sales Order** process. The following dialog will appear after the sales order is created:



Click on the **Yes** option to open the following **Create Tasks** dialog:



The dialog will list the inventory items contained within the proposal that are classified as **Service** and have the **Enter task for this item** option enabled within the general tab of the inventory item.

The tasks are created by clicking on each **Service Items** and clicking on the **Create Task** button. The new task wizard must be run individually for each service item. Service items can be combined by creating a task for one of the items, changing the billable time manually to total the amount of the combination of the items, and then ignoring the other items.

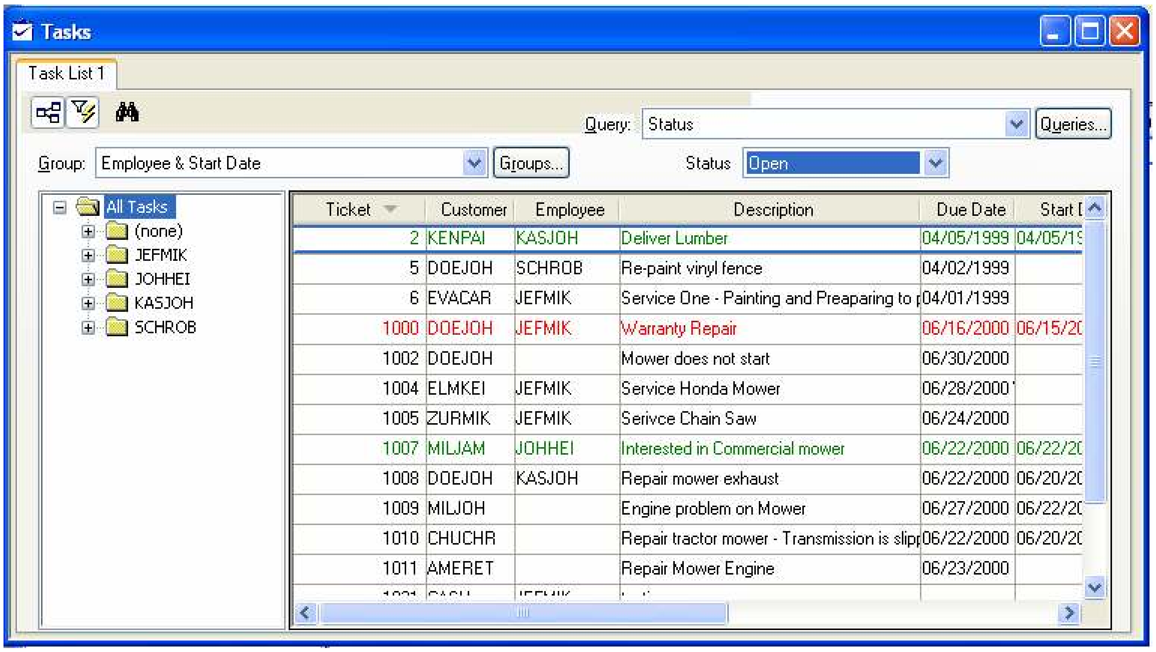
The **New Task** button can be used to launch the new task wizard without copying information from a service item.

Review the Proposal documentation for more details on creating and processing proposals.

Scheduling Tasks

The task module of EBMS can be used to schedule tasks or work orders for employees or departments. The date and time settings within the task are used to track the schedule date, due date, and track the progress of the task. Complete the following steps to configure the main task window to assist with scheduling tasks:

1. Open the main task window by selecting **Task > Tasks** from the main EBMS menu.

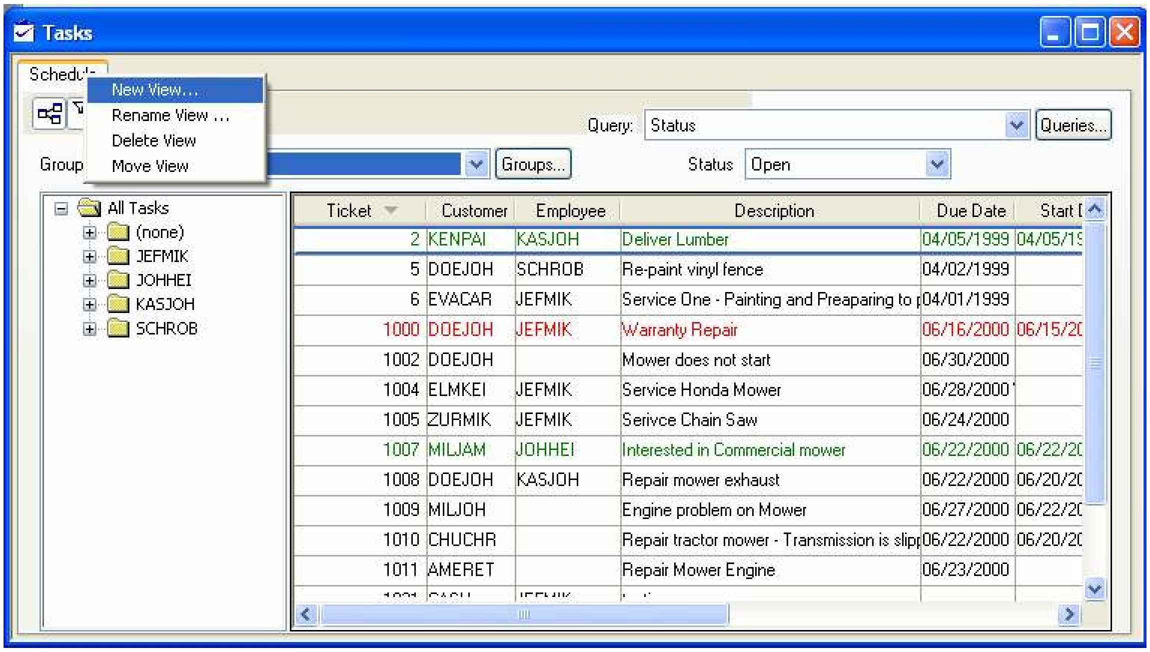


2. Rename the main task list tab located in the upper left corner of the task list. The tab may be labeled as **Task List 1** as shown above. Right click on the list label and rename the tab as *Employee Schedule* or other applicable label.

3. Set the **Query** setting to *Status* as shown above and select the *Open* **Status** option as shown above. This will cause only the open tasks or work orders to be listed. An additional query may be needed to only show open tasks for a specific manager if only a specific group of open tasks are being scheduled. Review the Creating Queries section for more details on query options.

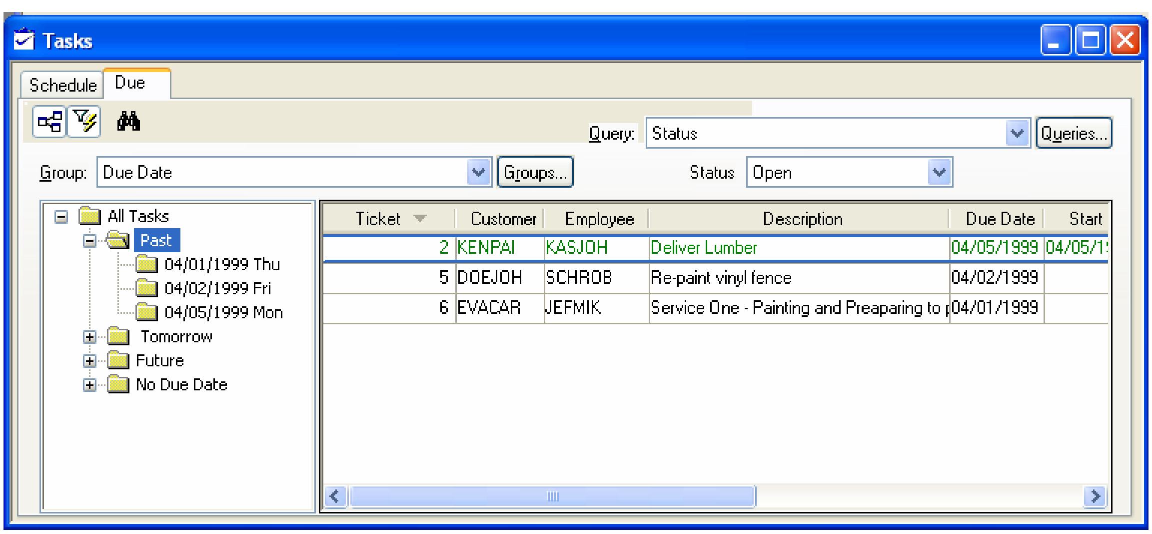
4. Set the **Group** option to *Employee & Start Date* to group open tasks by employee and scheduled start date. All open tasks that are not assigned will be grouped in the *(none)* folder. Review the Creating Task Groups section for more details about groups.

5. Create a second view to list tasks by due date. Right click on the list tab as shown below and select **New View** from the context menu.



6. Label the second tab *Due* and click **OK** to create the second tab.

7. The second tab will open with the same **Query** and **Group** settings as the original tab. Review the Creating Multiple Views section for more details on creating multiple tab lists. Change the **Group** option to **Due Date** as shown below:



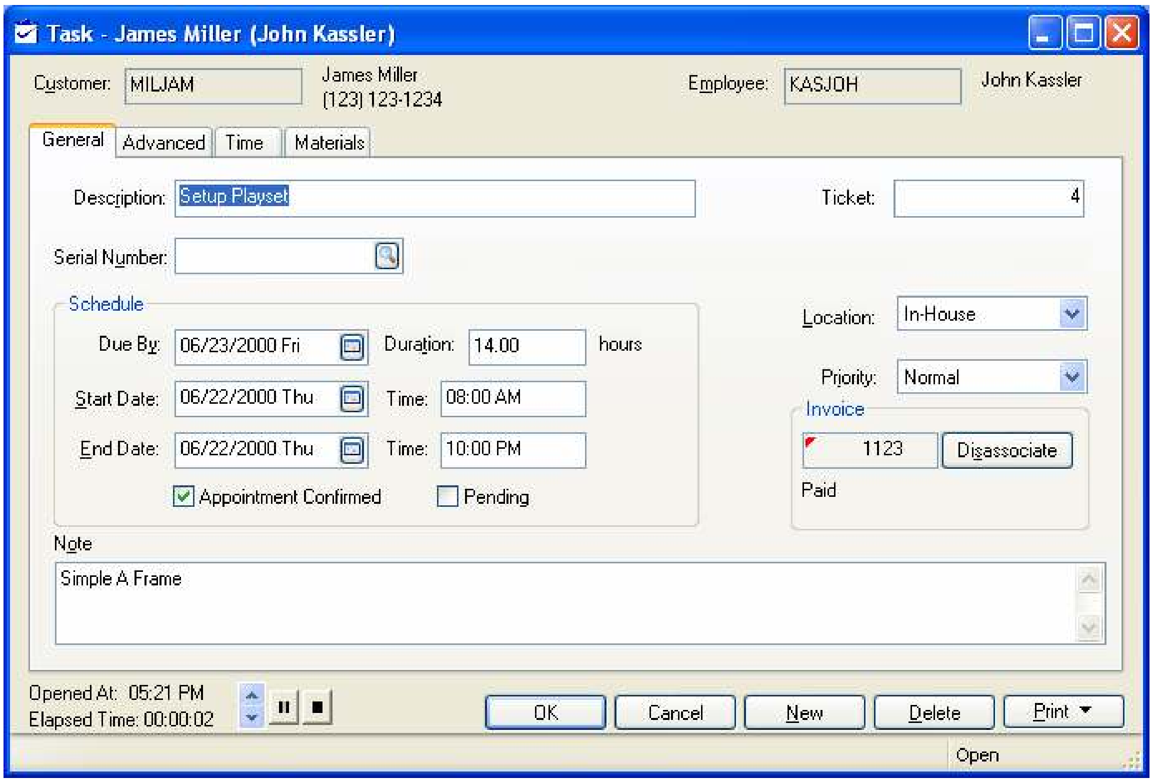
8. The tasks are grouped by the due date within the task. The task groups can be expanded to list tasks within each past due date. Click on the **All Tasks** folder to list

all open tasks. Click on the **Past** group to view only the tasks that are past due. Click on the individual dates to view only the tasks within a specific date.

Folder groups will appear only if a task exists within that group or date. Note the *No Due Date* folder in the list above. This grouping is useful to identify tasks with no due date.

Create additional tab views if additional lists such as pending tasks, tasks that are on hold waiting for parts, or completed task are needed.

Open a task by double-clicking on the task. The **Schedule** entries are found within the **General** tab of the task as shown below:



The **Schedule** entry fields are used primarily to schedule the task. The **Due By** date should be used if there is a deadline to complete the task. The **Start Date** and **Time** is to be used to schedule the task or work order. The **Duration** field is an optional entry used to estimate the amount of time required to complete the task. Populating the **Duration** entry will populate the **End Date** and **Time**.

Enable the **Appointment Confirmed** option if applicable. This enabled option will cause the task to show using a green color on the schedule list.

Tasks can be temporarily moved to a pending or waiting for parts list by changing the status. Review the Task Status Settings for more details on the status of the task.

Customizing Task Views

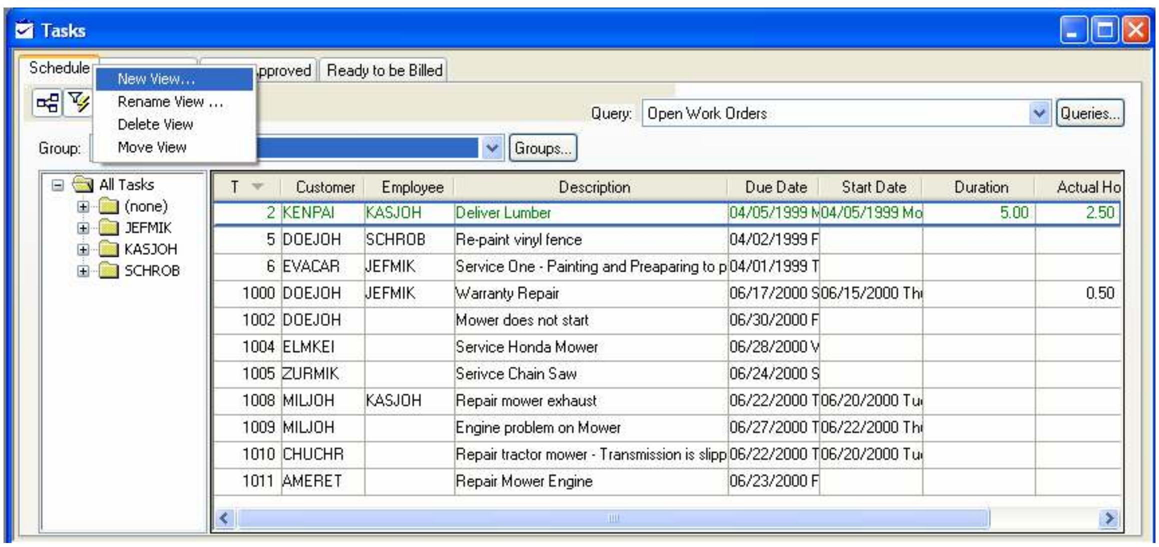
Creating Multiple Views

The task module includes some very flexible tools to view tasks or work orders. These views allow the user to manage and schedule tasks quickly and efficiently. The task windows can be configured to list tasks in a variety of views including the following:

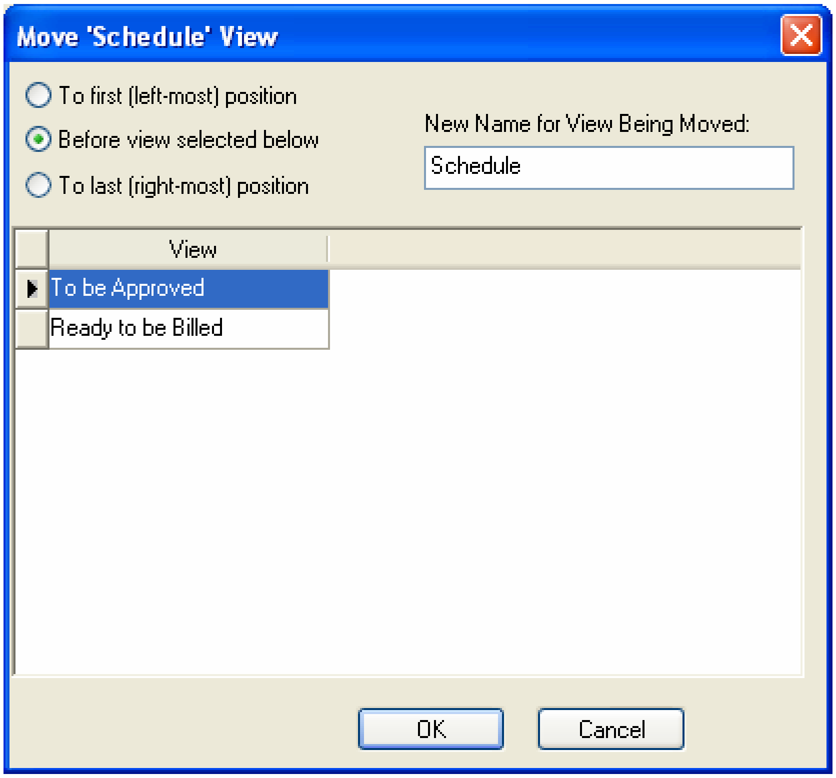
- List tasks by employee to manage a specific employee's work orders
- List tasks by status to manage the task from start to finish
- List tasks by date to assist with scheduling
- List tasks that are pending or are waiting for parts

Tasks can be listed, queried, or grouped by any field within the system.

The main task view window is launched by selecting the **Task** option from the **Task** menu as shown below:



Each view can be labeled for specific purposes and each contains a user defined **Query** and **Group**. Right click on the tab of an existing view to open the context menu as shown above. Click on the **New View** to create a new tab view. Tabs can be moved by selecting the **Move View** option dialog as shown below:

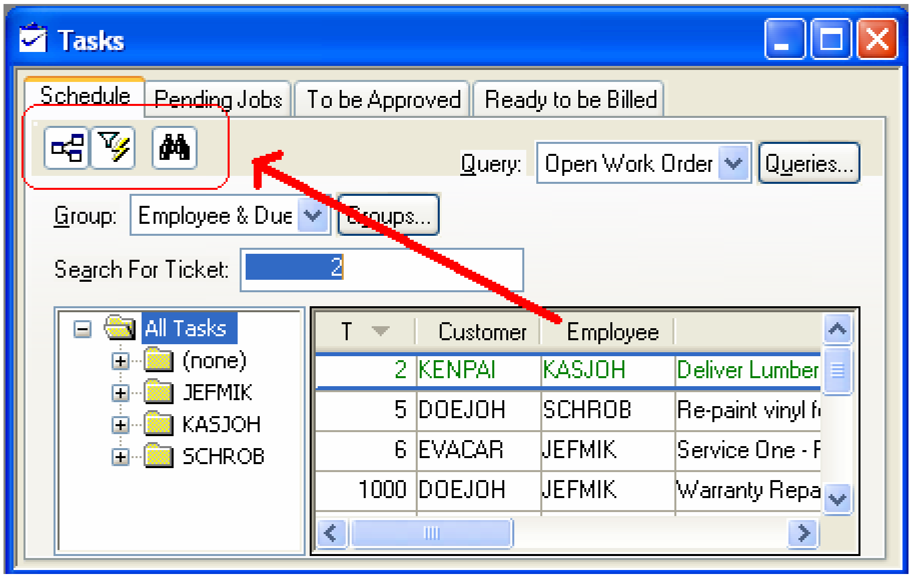


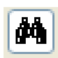
Click on the any of the **View** tabs listed to move the tab to the left of the selected **View**. Click on the first or last option to move the tab to the far left or far right position of all the tabs.

Select the **Delete View** option to remove a view tab. This option does not remove any information from the system. The **Delete View** only removes the list configuration.

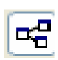
The benefit of creating multiple views is that it allows the user to switch from one view to another quickly. The software does not need to reload and group information each time a new view is desired.

Each view needs to be configured to list and group information in the desired format. There are 3 main options to set within each view. These 3 options can be activated by clicking on the specific toolbar icon as shown below:



The **Search** icon  is used to show the **Search** field. The user may click on a column within the task list to identify the column that is being searched. A specific task can be located by typing information into the **Search** field in a similar manner as other lookup lists.

The **Query** icon  is used to limit the view to tasks that meet the query or filter condition. Review the following section - Creating Queries for details on creating **Queries**.

Click on the **Group** icon  to group tasks in groups. If the **Group** option is enabled, the system loads all the applicable tasks into memory. It is important to disable this option if a large number of tasks are being listed.

These views are maintained for each user within the Windows Registry. The view settings must be set within each computer.

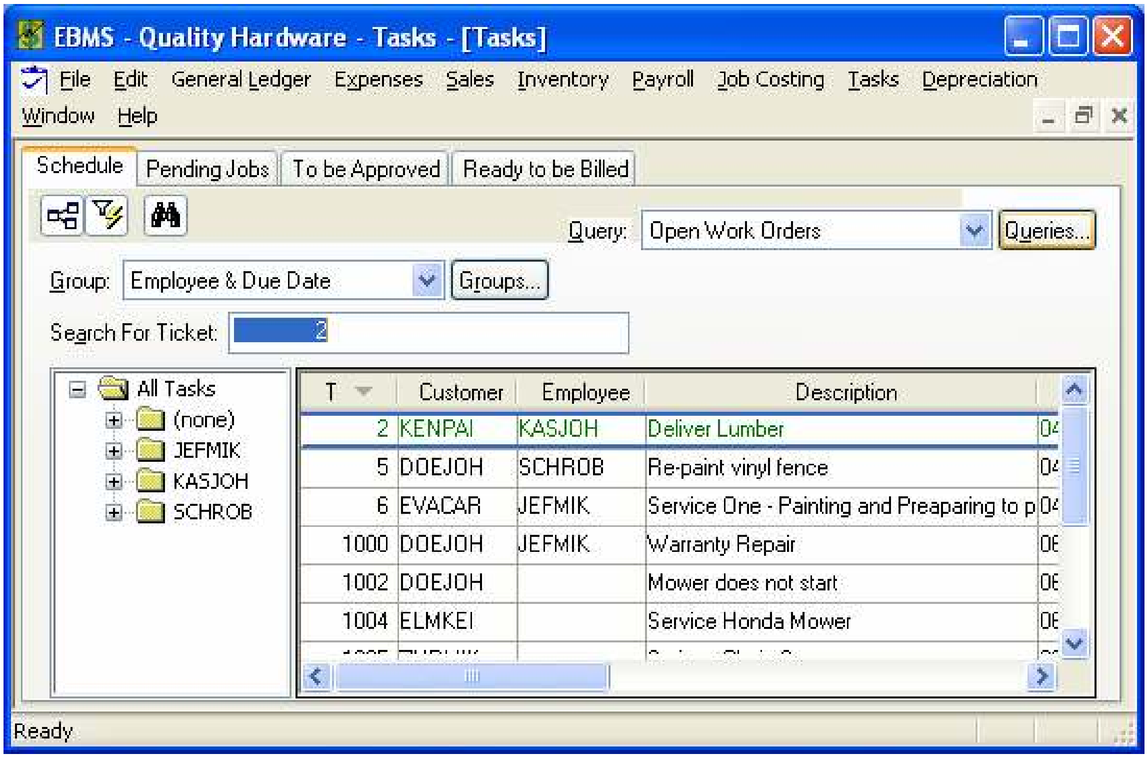
The following view combinations are common settings used in a variety of companies:

Group Label	**Query Setting**	**Group Setting**	**Comments**
Schedule	Open Work Orders	By Employee and Start Date	This is an excellent view to use to schedule multiple technicians or employees
My Tasks	Employee & Status	Start Date (or Due Date)	This is a good view to use for individual schedules
Waiting for Parts	Pending & Waiting for Parts	None	Review the Waiting for Parts or Materials section for more details
Overdue	Overdue (and manager)	Employee, Due Date, or Customer	This view is an excellent method to review tasks that are past due quickly.

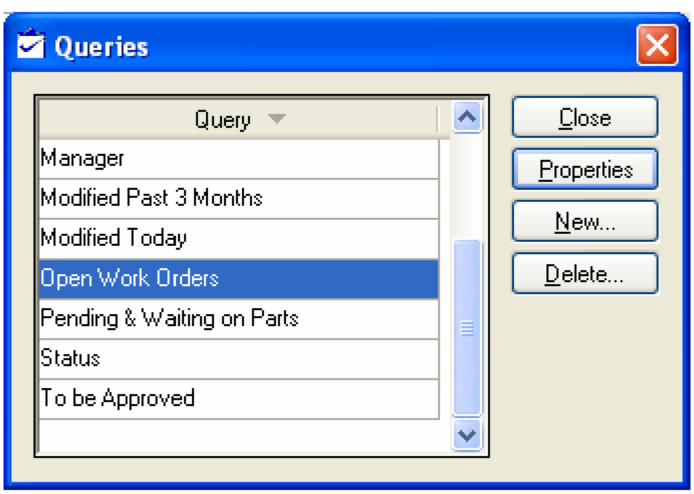
To Be Approved	To be Approved	Customer (or task Type)	Review the Approving Tasks section for more details on creating this view.
My Query	My Query	(varies)	This query is used to allow the user to quickly change the query for specific uses.
Status (Customer View)	Customer No Query if used in customer tab	Status	This view is an excellent setting to use in the task tab of the customer.

Creating Queries

A **Query** or filter is used to limit the tasks or records that are shown on the list. For example, a **Query** would limit the view list to only show open tasks. A defined or limiting query can reduce the amount of time required to load a list of tasks.

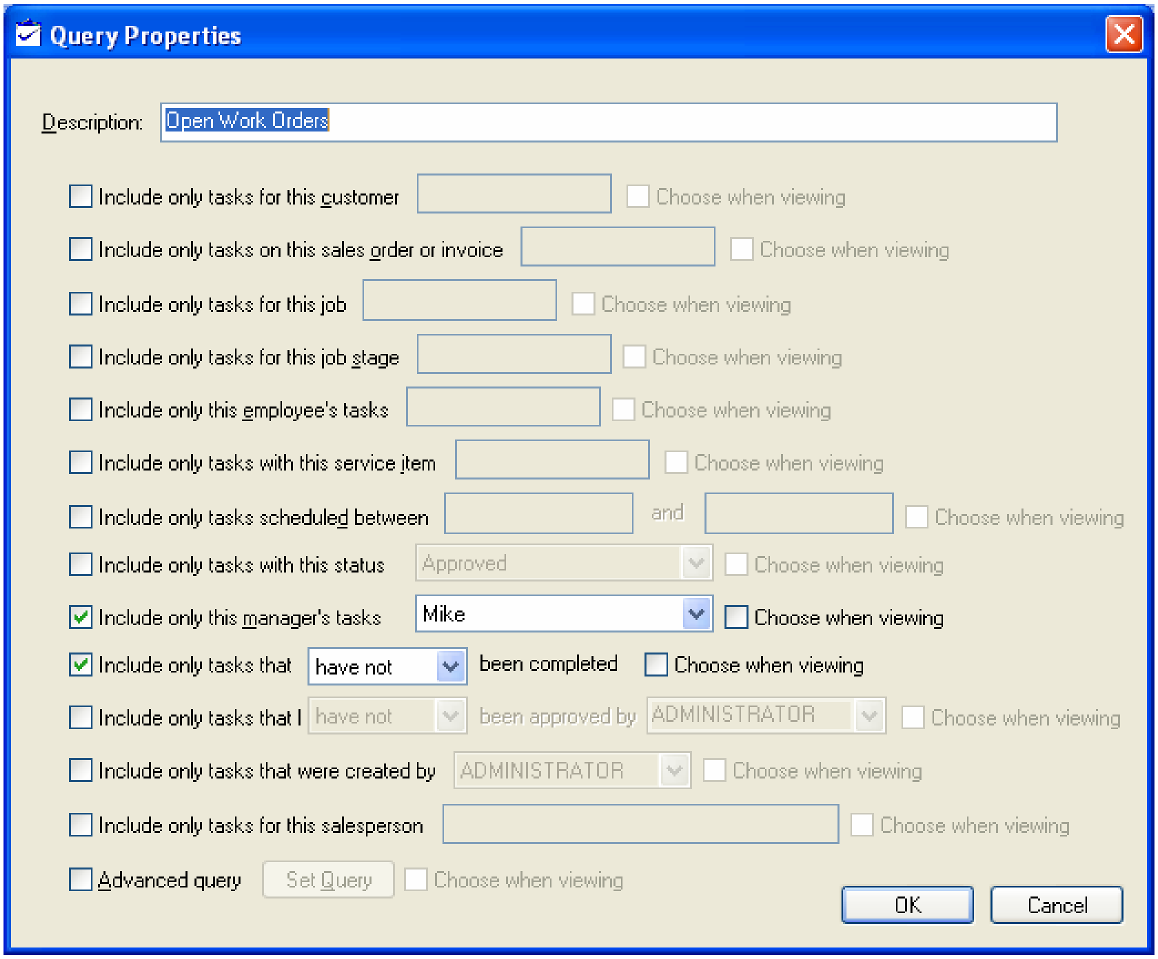


Click on the **Queries** button to set, create, and change the **Query** setting as shown below. Click on the query icon  if the **Query** option and button do not show.



Select a query and click on the **Close** button to change the query.

Click on the **New** button to open the **Queries Properties** dialog window as shown below:

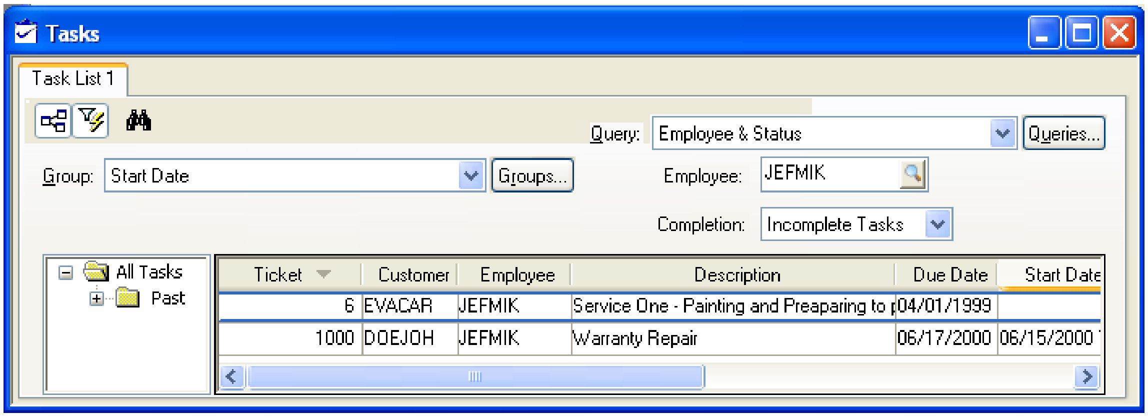


Enter a **Description** of the query.

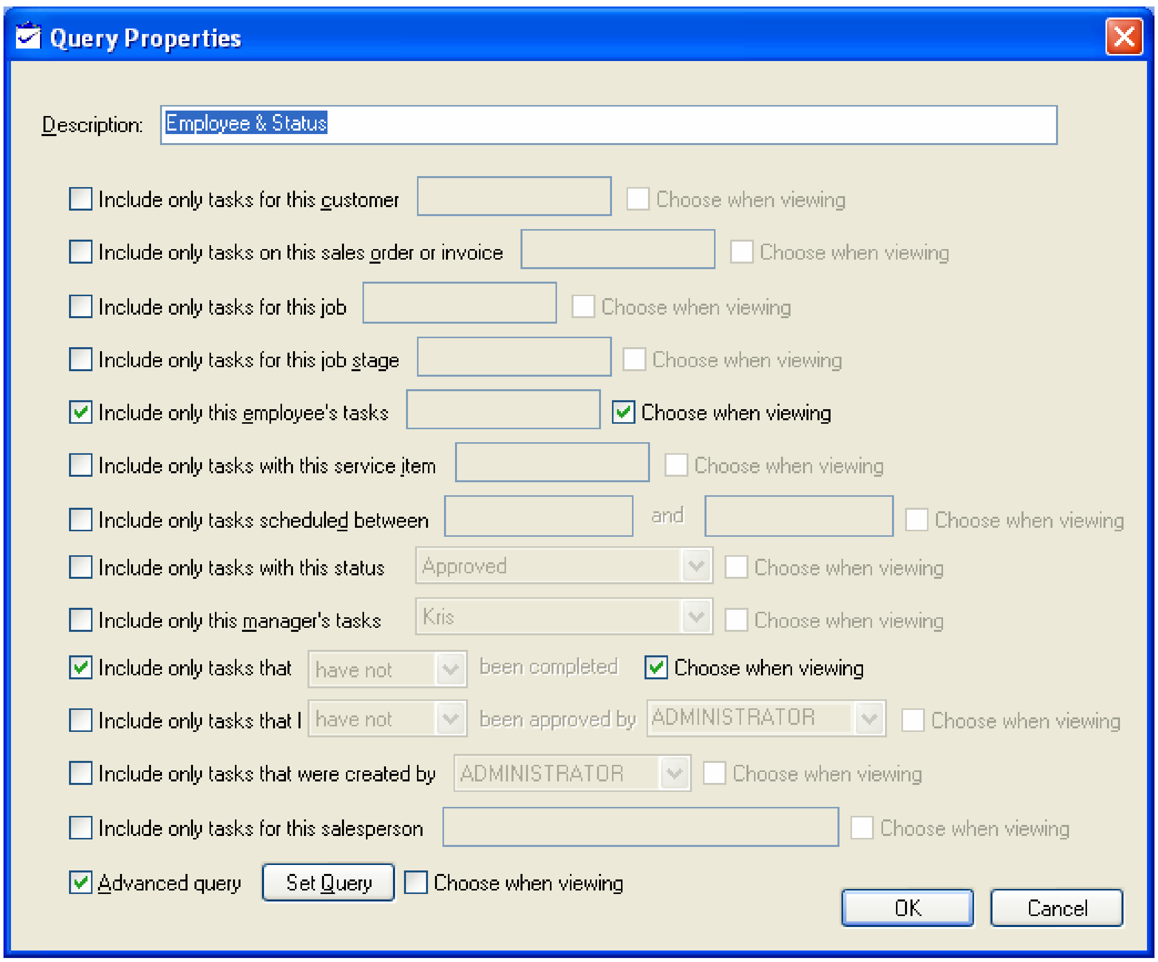
A list of some of the most common query options are shown on the **Query Properties** window. Click on one or more of the query options by clicking on the desired options.

In the example above the user wishes to list all the work orders in the service department. Since all work orders are organized under a single manager, Mike, the **Include only this manager's tasks** query is enabled. The **Include only tasks that have not been completed** query is selected to list only the open work orders. The **have** or **have not** options are part of the query.

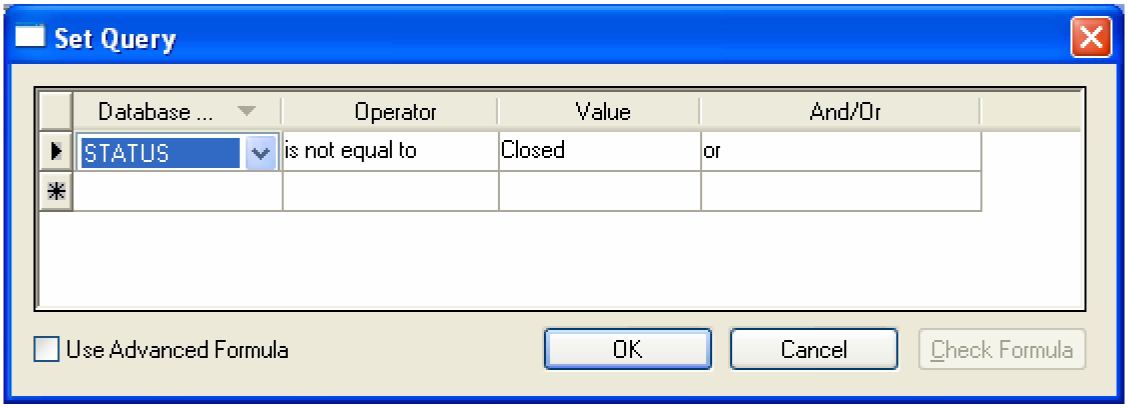
The system allows the user to choose an option such as employee, manager, status, etc from the view screen instead of setting the employee ID, manger, or other value with the query. Enable the option by clicking on the **Choose when viewing** option to the right of the option. For example the user can add the **Employee** and **Completion** options to the header of the task view window as shown below:



See the **Query Properties** settings below:



This query also includes an **Advanced query** setting. Click on the **Set Query** button to view the advanced query dialog as shown below:



The **Advanced query** setting can be used independently or in conjunction with the other query options. Review the Features > Advanced Query Options section within the main documentation for more details on the advanced query.

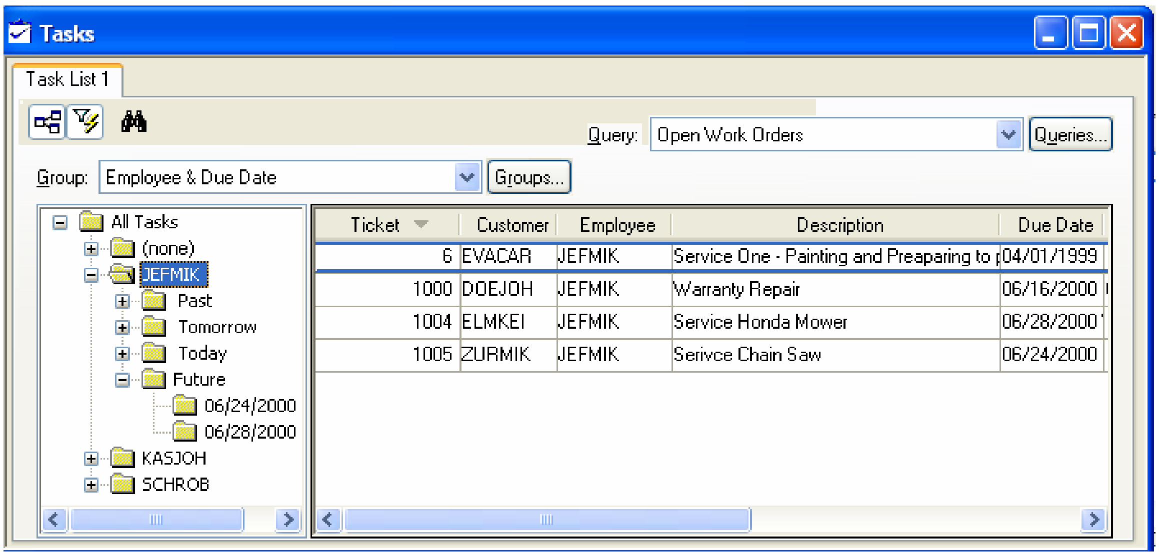
Click **OK** on properties button to return to the query option list.

Click on the **Properties** button to make changes to an existing query.

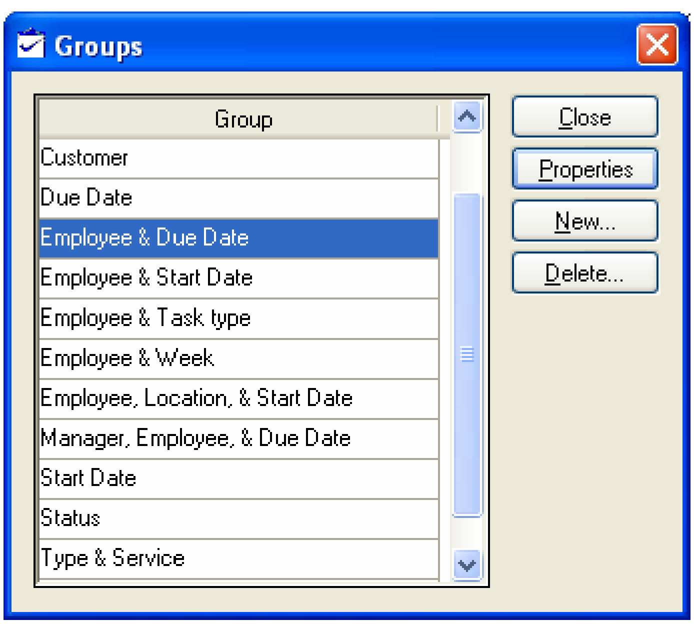
Creating Task Groups

The task group feature within the task module is a powerful tool to organize tasks and work orders in a convenient manner. Click on the icon to enable the group option. Disable this option to enhance performance if the query includes a large number of records. The group feature requires the system to load all records into memory before displaying the information. A virtual list is utilized if the group option is disabled. Records within a virtual list are not loaded into RAM memory until the information is displayed.

The task module groups information within multiple user-defined levels. This feature gives the user many display options within a specific view tab. For example, the **Group** option in the task list below was selected to schedule an employee. The **Employee & Due Date** setting groups the task by Employee ID, Past/Today/Future setting, and Date.

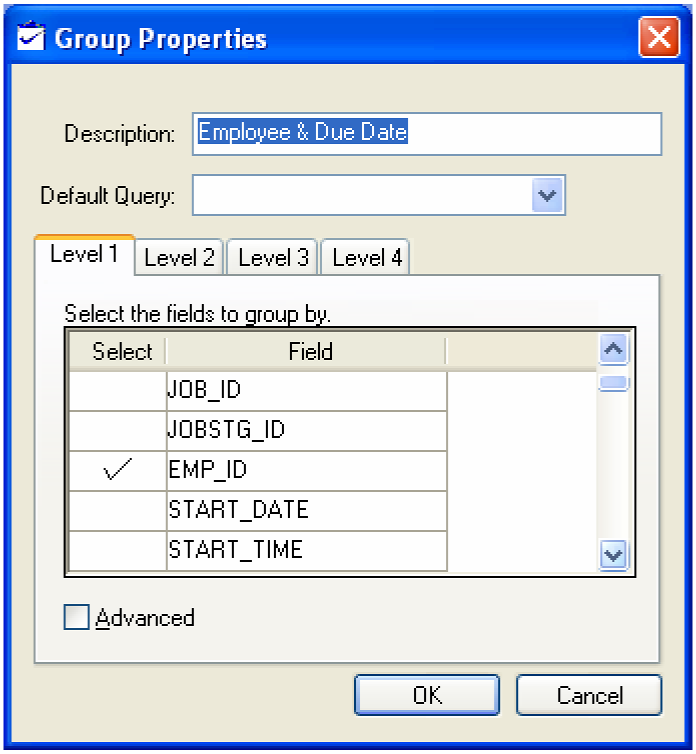


Click on the **Groups** button to change or edit a group setting.



Select a new group and click the **Close** button to select a new group.

Click on the **Properties** button to view or edit the group settings as shown below:



The group **Description** describes the grouping.

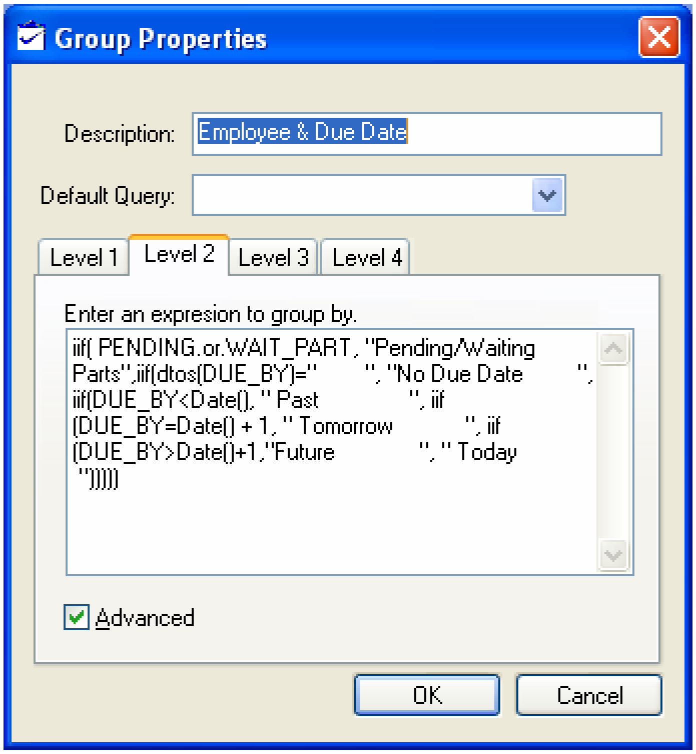
The **Default Query** setting allows the user to associate a query setting to the group. This option is left blank if the **Group** and **Query** settings are independent of one another. Review the Creating Queries section for more details on queries.

The **Employee & Due Date** example contains three levels:

- **Level 1 –** Employee
- **Level 2 -** Past/Today/Future
- **Level 3 –** Date
- **Level 4** is extra

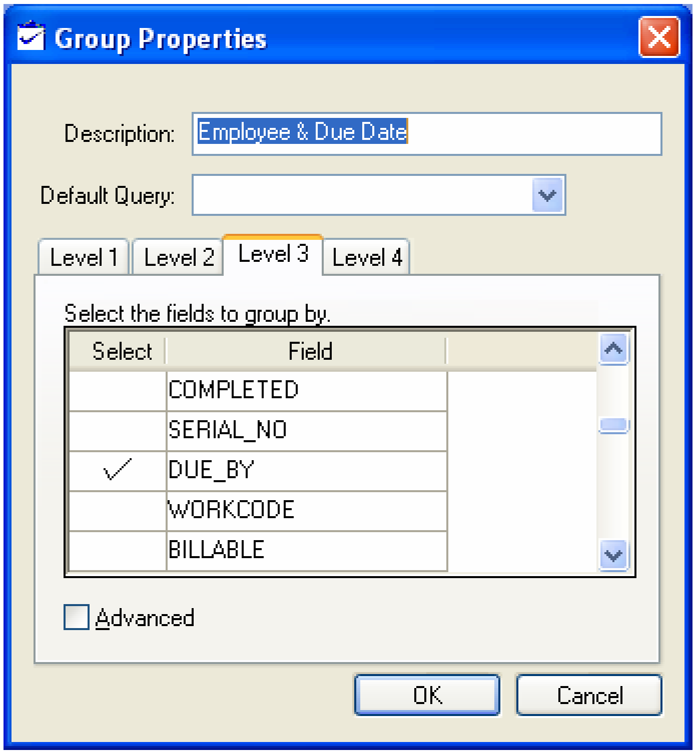
Check one or more of the options within the list to identify a field within the first level of the group. The selected field - **EMP_ID** in the example shown above, groups the first level of the task view by the employee id. Review the Features > Advanced Query Options section in the main manual for details on identifying a field name.

Click on the **Level 2** tab as shown below:



The **Level 2** grouping option is using **Advanced** code to group the second level. The second level is not identified by a single field or two but is created using programming code. The **Advanced** option is enabled to change the grouping option from a field list to programming code. This code is similar to the advanced query code explained in the Features > Advanced Query Options section of the main manual.

Click on the **Level 3** tab as shown below:

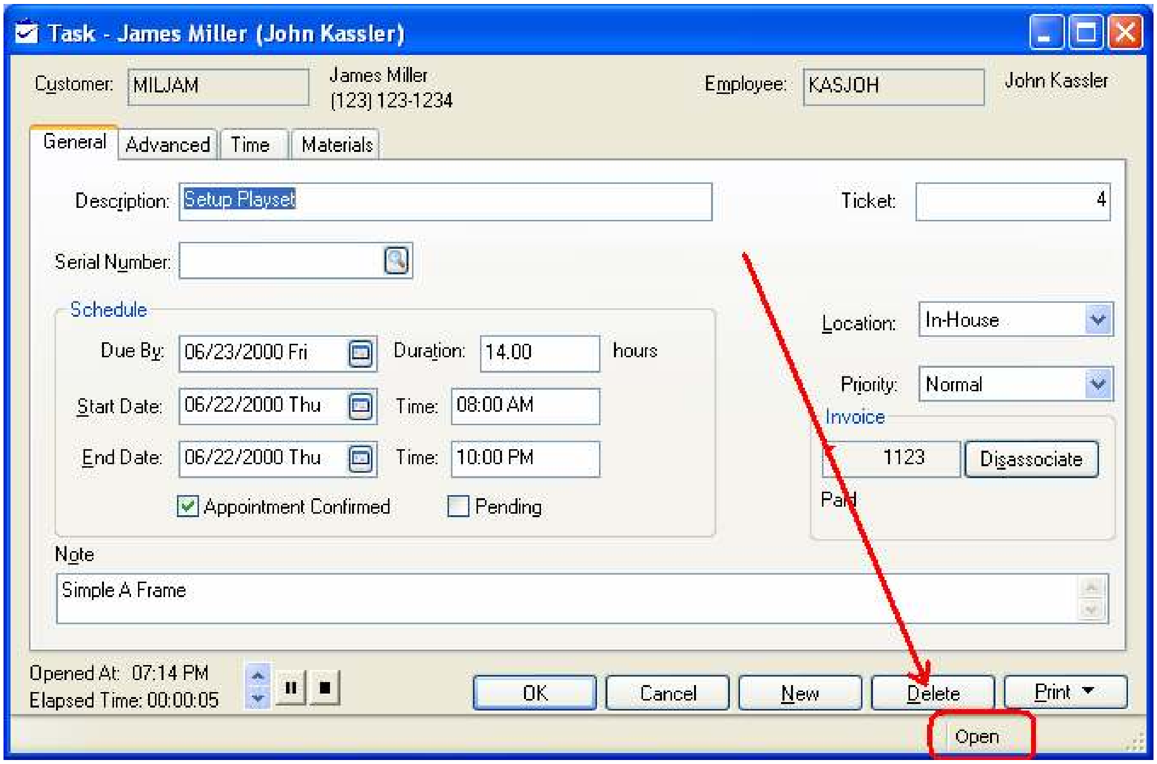


Configure the **Level 3** tab of the group by selecting the **DUE_BY** field. You may need to scroll to find the selected field within the group since the task record consists of a large number of fields.

The last level (**Level 4** in example above) always contains a list with no selections. A new unselected level will appear each time fields are selected within the "last" tab.

Task Status Settings

The **Status** setting is a common task setting used to group or query tasks and work orders. The status of a task is displayed on the lower right corner of the task.



The status value is not changed directly by the user but is set based on the conditions of various information within the task.

The standard tasks status options are as follows:

Status	**Condition**
Open	**Time > Completed** is disabled
Pending	**Time > Completed** is disabled and **General > Pending** is enabled
Waiting for Parts	**Time > Completed** is disabled and **Materials > Waiting on Parts** is enabled
Completed	**Time > Completed** is enabled
Approved	**Advanced > Approved By** is populated and **Time > Completed** is enabled
Billed	**Time > Completed** is enabled and the attached invoice is processed

Closed	**Completed** is enabled, **Approved By** is populated, and (Attached invoice status is paid OR (No invoice is attached and the **Time > Billable** is zero))

The system evaluates each condition according to the *sort* order of the records. The sort order is extremely important because the status is set when the first condition is TRUE. Additional status settings and conditions can be added to the EBMS task system by adding records within the TAStatus.DBF file.

Review the Using Tasks as Work Orders section for a status diagram when using a task as a work order.

Managing Tasks

Printing Tasks and Work Orders

Tasks or work orders can be printed to facilitate the flow of information from the time the task is created until it is completed and billed or it can be a tag that is printed and attached to a piece of equipment.

The following dual column work order is one of the work order forms available to give to a technician in the shop or other location:

Quality Hardware
Main Street
P.O. Box 100
Lancaster, PA 17603
Phone: (222) 989-8989
Fax: (222) 989-7979

Customer
Keith Elmer - ELMKEI
125 North Potts Rd
Pottstown, PA 19640

Phone (610) 233-5766
E-Mail
Fax (610) 233-8593

Work Order

Task	Scheduled Date	Scheduled Time	Page
7	6/15/2000		1

Workcode: BUILD
Salesperson: ADMINISTRATOR
Employee: John Kassler

Ordered	Shipped	Materials	Each	Amount
1.00	_____	TACHAM - Tack Hammer	14.95	14.95
0.17	_____	ELMWOO - case Elmer's Wood Glue	2.75	5.50
5.00	_____	PGALPGVAL - Gallon of Valspar Premium Gloss Pait	20.95	104.75
10.00	_____	PCANSPY20 - 20 Oz. Can of Spray Paint	3.50	35.00
5.00	_____	WHEBAR - Wheelbarrow	59.00	295.00
1.00	_____	HALWRE - ea 1/2 in Wrench	1.35	1.35
3.00	_____	BIRBAT - Birdbath	19.95	59.85
0.58	_____	ELMWOO - case Elmer's Wood Glue	2.75	19.25
2.00	_____	DUCTAP - Roll of Duct Tape	1.65	3.30
5.00	_____	300-RLE-30110 - Romaine Lettuce - 10 lb. case	5.75	28.75
5.00	_____	300-RLET-30500 - Red Lettuce - 20 lb case	5.75	28.75
4.00	_____	300-RRA-30260 - Red Radish - 15 lb. case	15.50	62.00
1.00	_____	200-VRT-20410 - Red Vine Ripe Tomato - 20 lb. case	7.75	7.75
3.00	_____	200-BAN-20101 - Banana - 20lb case	2.99	8.97
3.00	_____	RAKHEA - Rake Head	26.95	80.85
2.00	_____	GARHOS25 - 25' Garden Hose	13.50	27.00
3.00	_____	200-BAN-20101 - Banana - 20lb case	2.99	8.97
5.00	_____	300-5MU-300150 - Mushroom - 5 lb basket	3.99	19.95
3.00	_____	200-BAN-20101 - Banana - 20lb case	2.99	8.97
3.00	_____	GARHOS25 - 25' Garden Hose	13.50	40.50
				Materials Subtotal - $861.41

Total Material

Directions:
The directions to this customer are here. Any customer-specific directions are here.The directions to this customer are here. Any customer-specific directions are here.The directions to this customer are here. Any customer-specific directions are here.

Task Notes:
Task notes here. These notes are in the task. Task notes here. These notes are in the task. Task notes here. These notes are in the task. Task notes here. These notes are in the task. Task notes here. These notes are in the task. Task notes here. These notes are in the task. Task notes here. These notes are in the task. Task notes here. These notes are in the task.

Labor	Amount
Prints	90.00
	Labor Subtotal - $90.00

☐ Completed ☐ Incomplete

	Time	Mileage
Stop		
Start		
Total		

Total Labor
Total Material
Tax
Total

Customer Signature: ______________________ **Date:** ________

Tech: ________ **Signature:** ______________________ **Date:** ________

Created by Eagle Business Management Systems

- The materials list printed on the left page of the work order are entered within the sales order connected to the task or work order. The shipped quantity will not show on the work order.

- The contact information printed in the center of the form header and the directions are derived from the customer record. The directions section will not show if no directions exist within the directions tab of the customer.

- The task notes are found on the general tab of the task or work order. The notes section will not exist if the directions are blank on the customer and the task note is blank.

- The parts that are used should be noted by writing the quantity in the shipped column. The subtotal should be crossed out if not all the parts are used. Additional parts should be noted on the materials list and totaled at the bottom – **Total Material**. The **Total Material** value should be copied to the lower left work order total area in the value box with the same label.

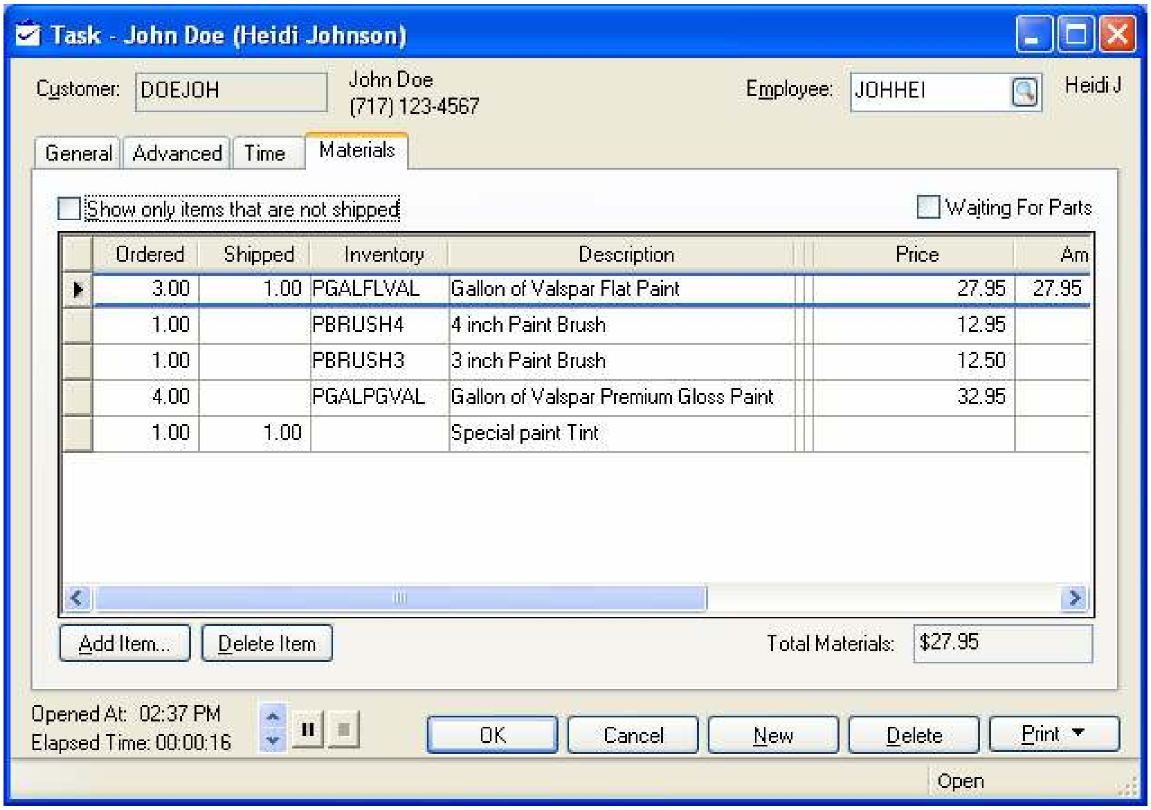
- Notes about the work that was performed should be noted in the labor section. Additional costs should be totaled in the **Total Labor** box on the lower right side of the form.

The task work order should not be used to generate a complete invoice. The task notes should be imported into the sales order and then the dual column sales invoice should be printed. Review the Billing a Project or Task section for more details on generating an invoice.

Recording Parts and Materials

An important step in managing a work order or task is to properly record parts and labor notes within a task. This information can be entered directly into the task window if the repair personnel have access to a computer. Bar code scanners or touch screen project stations can also be used to record time and materials. The technician can record time and parts information on a printed repair order and then be entered into the EBMS task system by a secretary. Review the Printing Tasks and Work Orders section for details on hard copy work order options.

Click on the **Materials** tab of the task as shown below:



The **Materials** tab will list the items within the entire invoice with some exceptions.

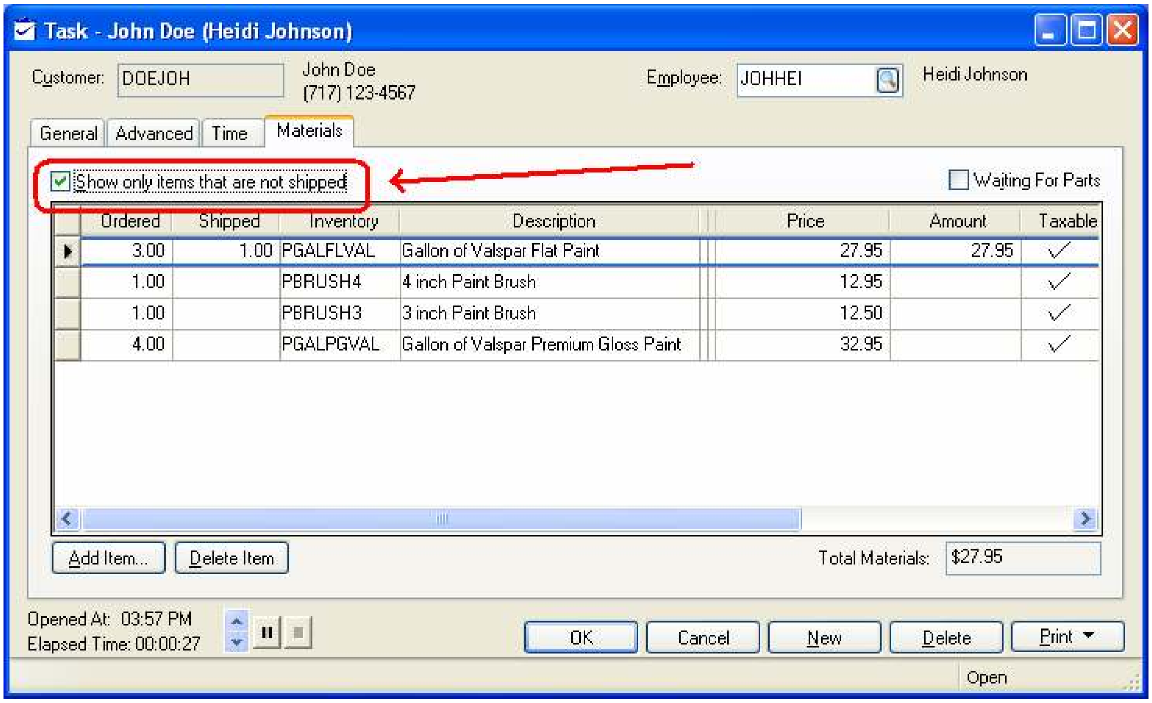
The following items will show on the list:

- All inventory items that are classified as **Track Count**, **No Count**, **Serialized Items**, and other track count classifications. (All classifications except **Service**)
- All invoice lines with no inventory item that have an **Ordered** or **Shipped** quantity that is non-zero.

The following items will not show:

- All inventory items that are classified as **Service** will NOT show.
- All invoice lines that do not contain an inventory item and do not have a value entered into the **Ordered** or **Shipped** columns.

The line items that have been fully shipped can be hidden by enabling the **Show only items that are not shipped** option as shown below:



The **Ordered** column should reflect the parts and materials that were ordered for a task or project. The user should populate the **Shipped** column when the items are pulled from inventory or used on the project. Populating the **Shipped** column will affect the **On-Hand** value within the inventory system.

Use the **Add Item** button to add parts or the **Delete Item** button to remove parts from the work order. These buttons are disabled in the following situations:

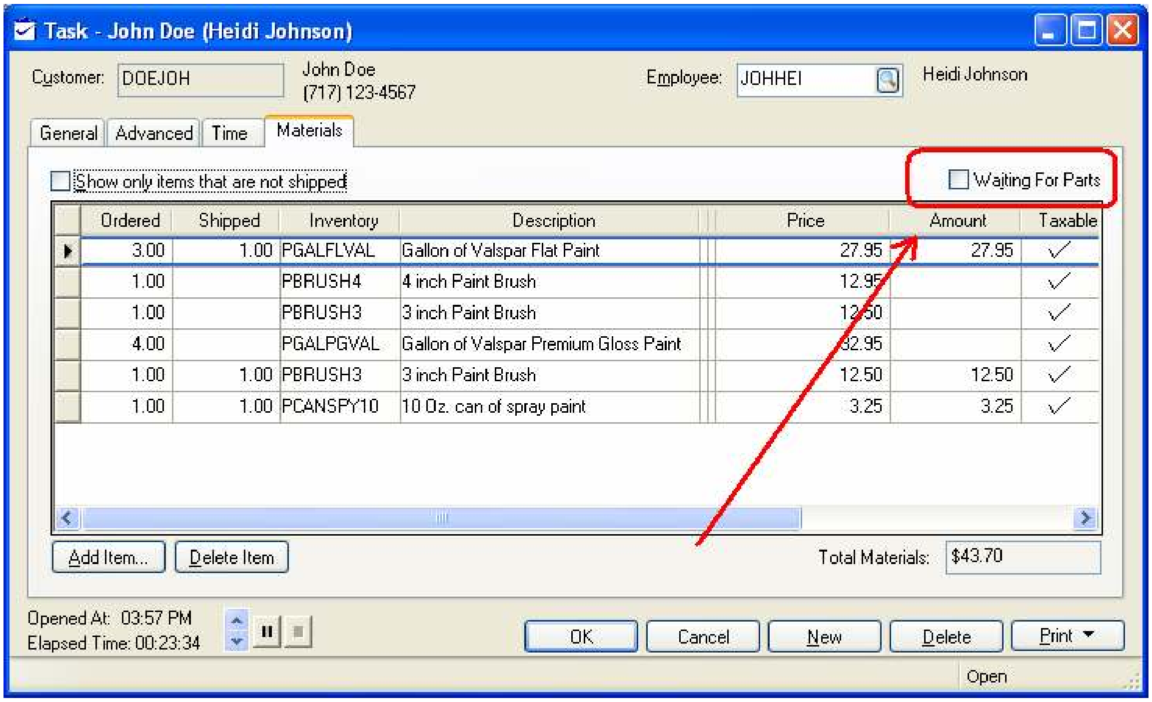
- The **Base Type** found in the **Advanced** tab is not **Time and Materials Service**. Review the Time and Material tasks vs. Contract Tasks for more details on T&M tasks.

- The sales order has been processed into an invoice.

Review the Waiting for Parts or Materials section for details on the **Waiting For Parts** option on the **Materials** tab.

Waiting for Parts or Materials

The **Waiting for Parts** option is located on the **Materials** tab of the task as show below:

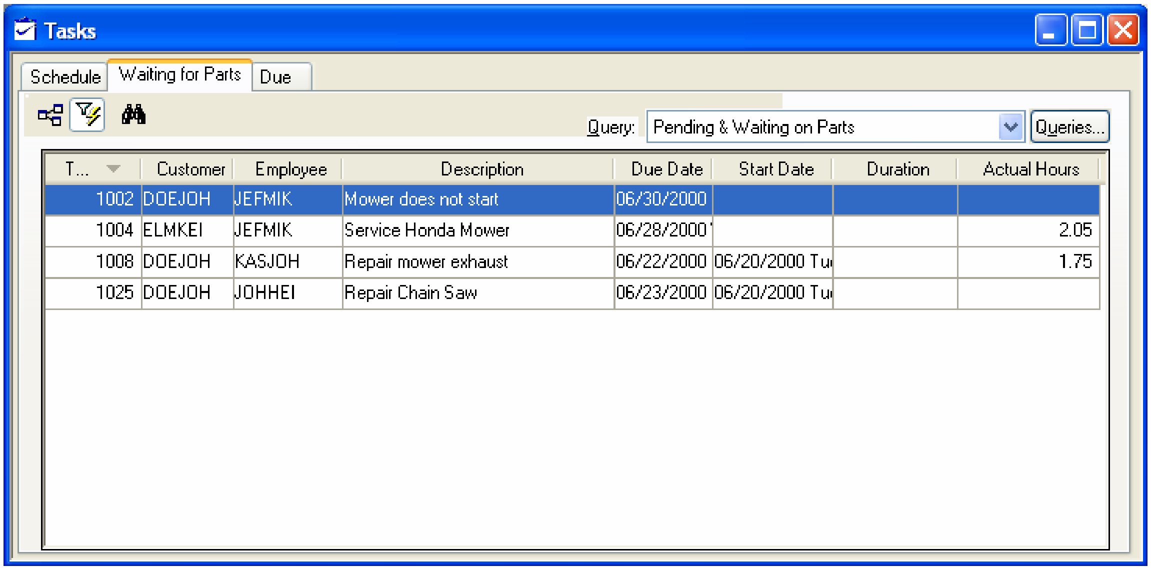


This option is used to manage tasks that are delayed or pending because of missing parts needed to complete the task. The **Waiting for Parts** option can be enabled immediately after the task is created if the project is pending because of parts or tasks that are delayed because of missing parts.

The status of the task will change to **Waiting for Parts** when this option is enabled. Create a task view within the main task window to display the pending task. Complete the following steps to create this view:

1. Go to **Tasks > Tasks** to open the main task window.

2. Create a **Waiting for Parts** tab as shown below:



Review the Creating Multiple Views section for detailed instructions on creating a new view.

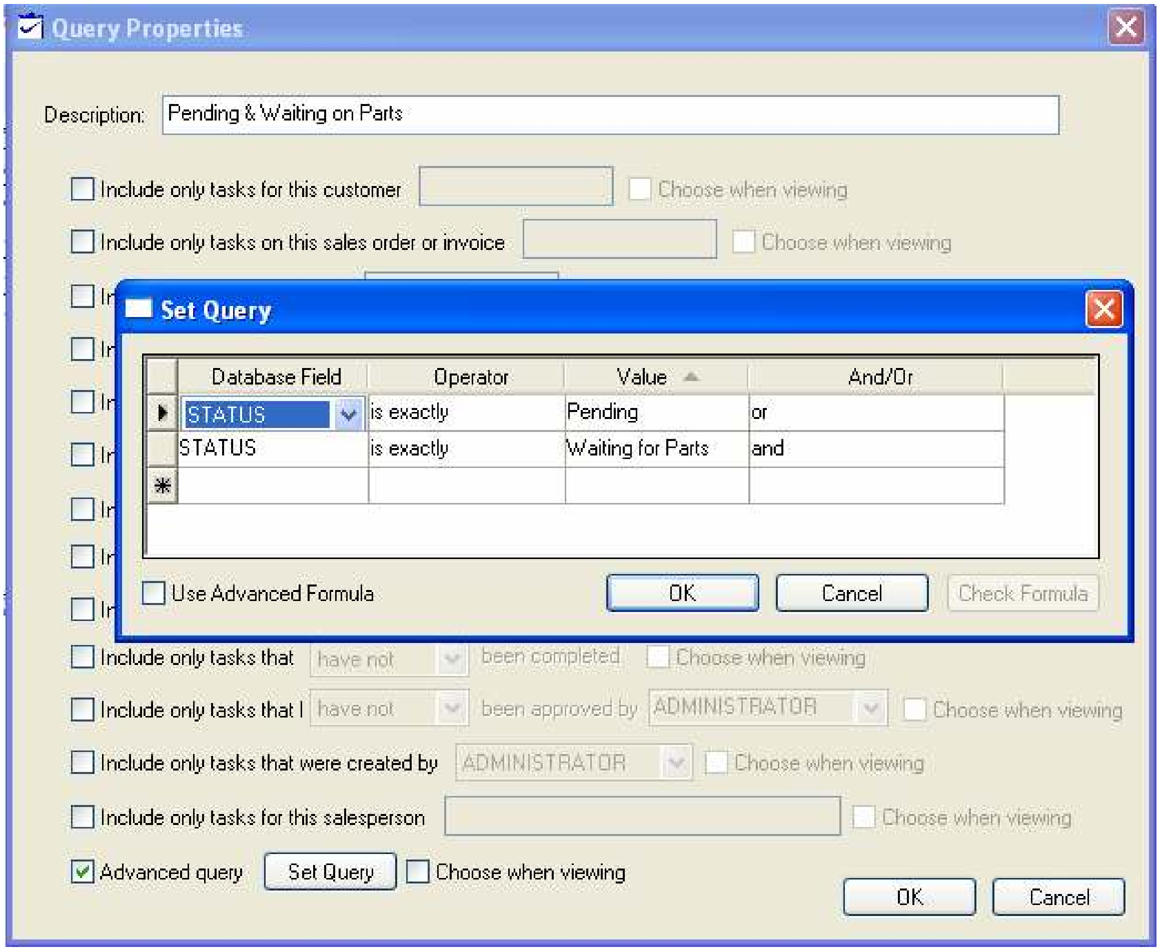
3. Set the **Query** option to the **Pending & Waiting on Parts** query option. Create this query if it does not exist by completing the following steps:

    a. Click on the **Queries** button to open the query list.

    b. Click on the **New** button to create a new query.

    c. Enter a query label - **Pending & Waiting on Parts** within the **Description** field.

    d. Enable the **Advanced Query** option and click on the **Set Query** button.



e. Set the **Database Field**, **Operator**, and **Value** settings as shown above. The **And/Or** setting of the first line must be set to **OR** to include both status settings. The **And/Or** setting on the second line is not used since the settings on line 3 are blank. Click **OK** to save advanced query settings.

The query settings within this dialog will query all tasks that have a **Status** that **is exactly** equal to **Pending or Waiting for Parts**. A query based on a single status could be set within the main query option list rather than using the **Advanced query** option. For a single status query, enable the **Include only tasks with this status** option and set the status setting to **Waiting for Parts**.

Review the Creating Queries section for more details about queries.

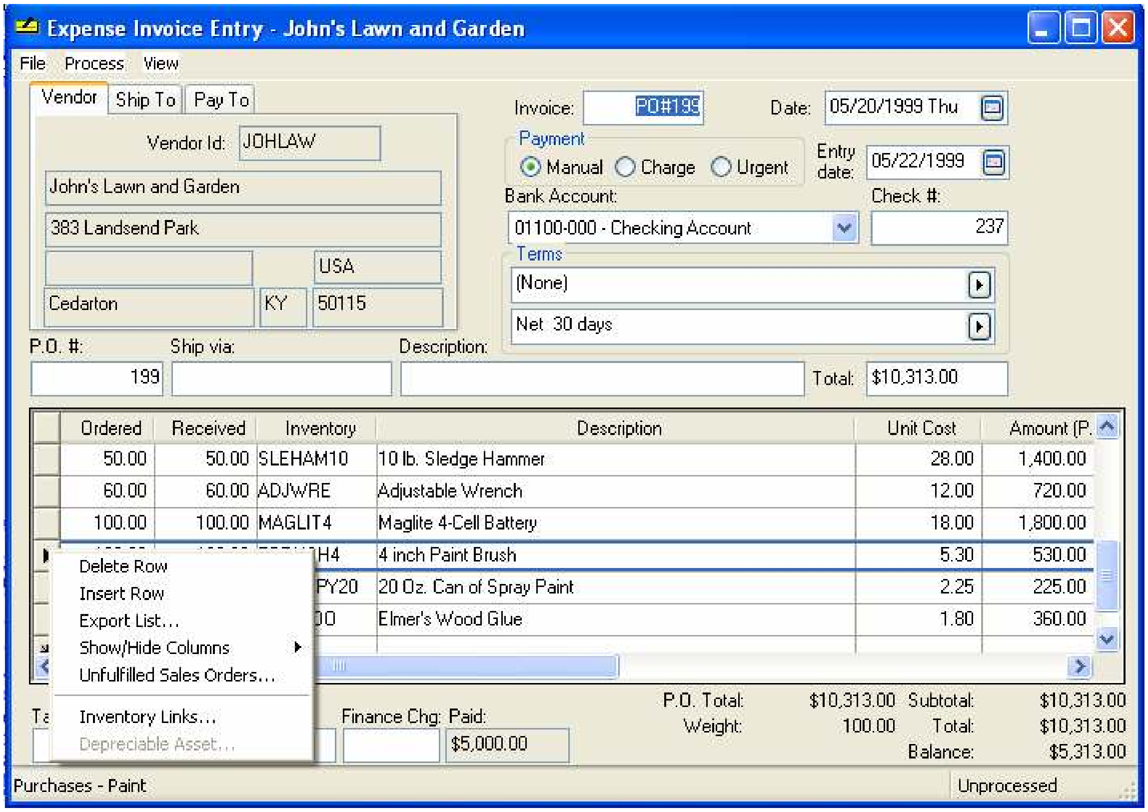
4. Disable the group option within the list since the number of tasks in this query will be minimal. Review the Creating Task Groups section for more details on the group options.

This view is useful to manage tasks that are pending.

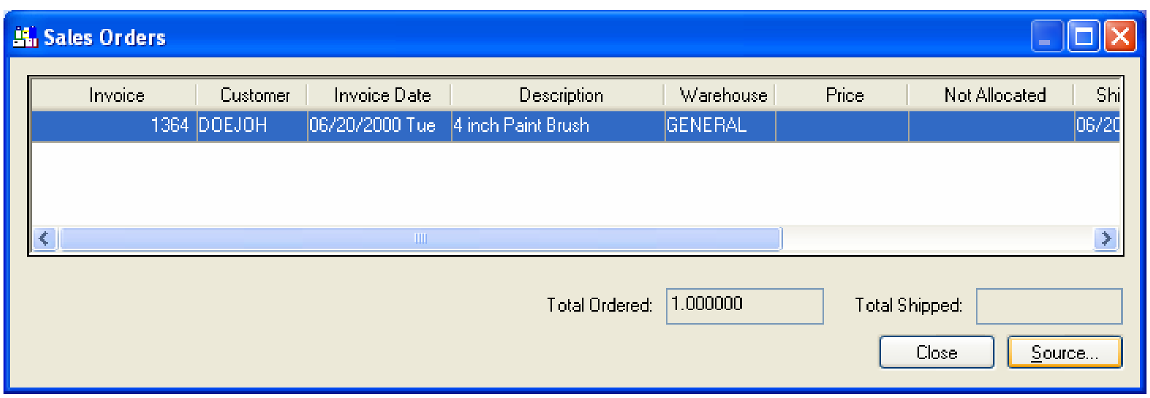
Continue with the following steps to review the tasks as parts are received. These steps are normally managed by the receiving department.

5. Open the purchase order screen when parts are received. Review the Expenses > Purchase Orders > View and Edit Purchase Orders section within the main EBMS manual for more details on purchase orders.

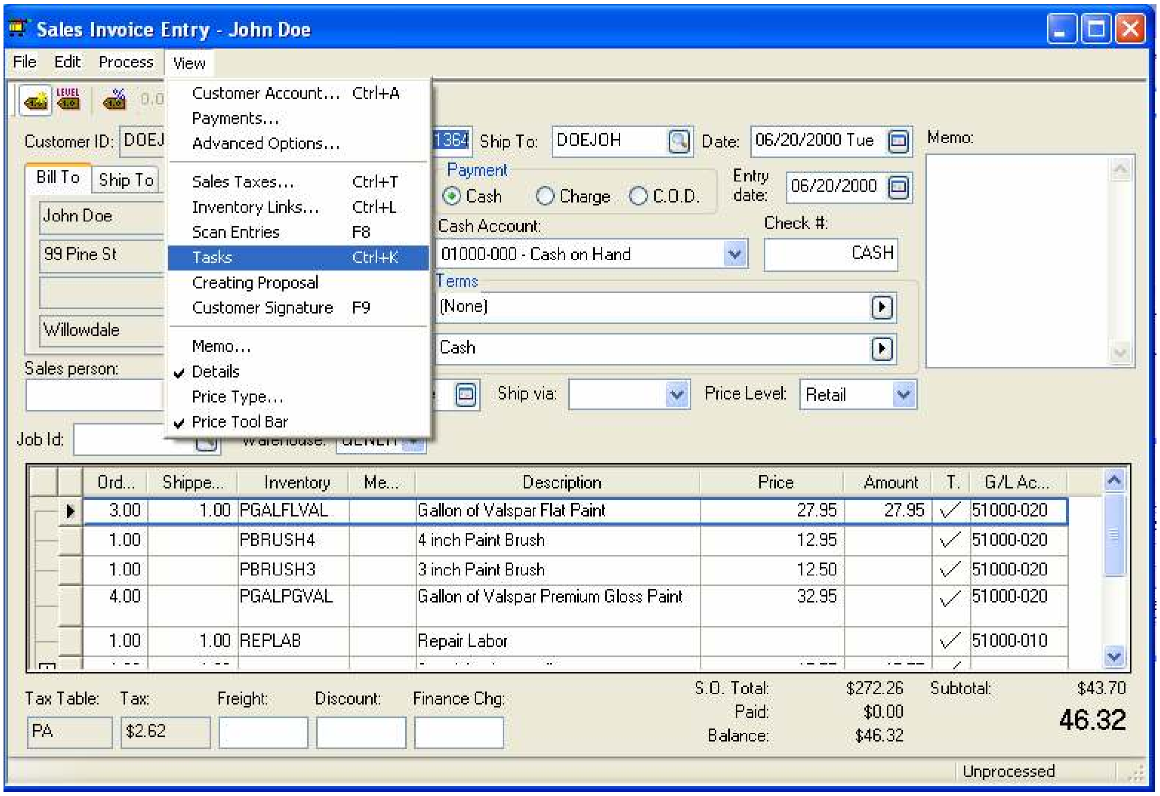
6. Right click on each individual items as shown below:



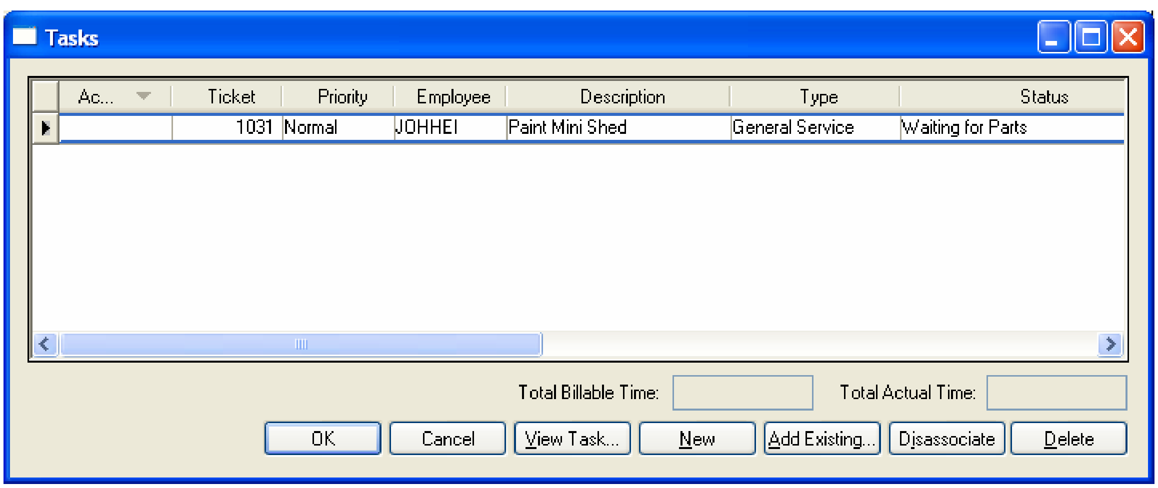
7. The **Unfulfilled Sales Orders** option will only show if unfulfilled sales orders exist. The following list will open if the **Unfulfilled Sales Orders** is selected:



8. Select the sales order and click the **Source** button to open the sales order.

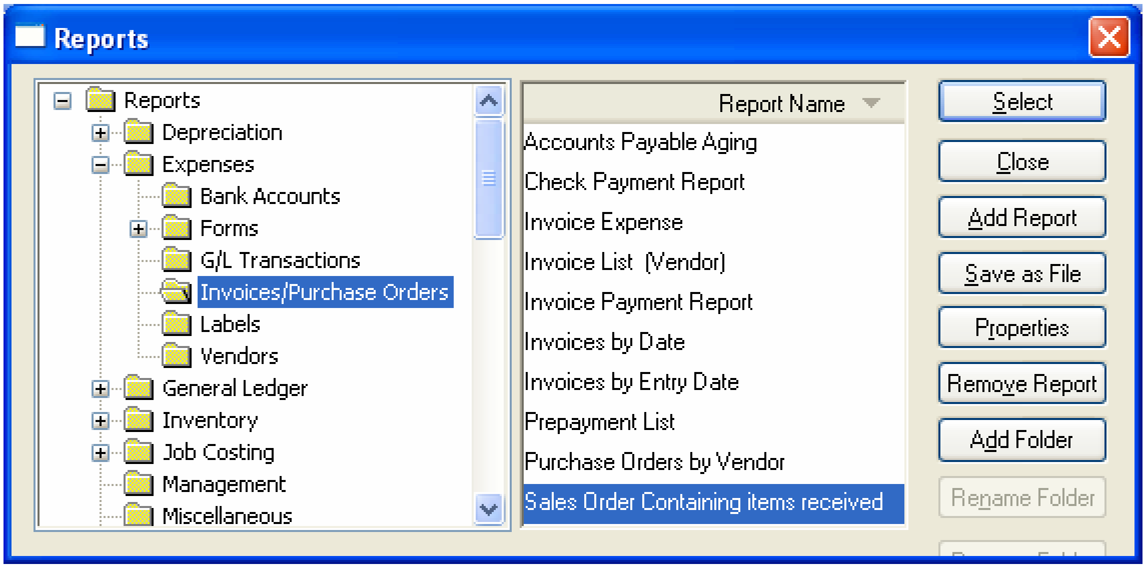


9. Open all the tasks by selecting **View > Tasks** from the purchase order menu.



10. Open the task from the task list by highlighting the task and clicking the **View Task** button. Change the task status from **Waiting for Parts** to **Open** by disabling the **Waiting for Parts** option within the **Materials** tab. This step will cause the task to show on the technician's task list again.

The **Sales Order Containing Items received** report can also be used to print a list of sales orders that contain items that are listed on the purchase order. Attach the following report to the purchase order print menu for easy access.



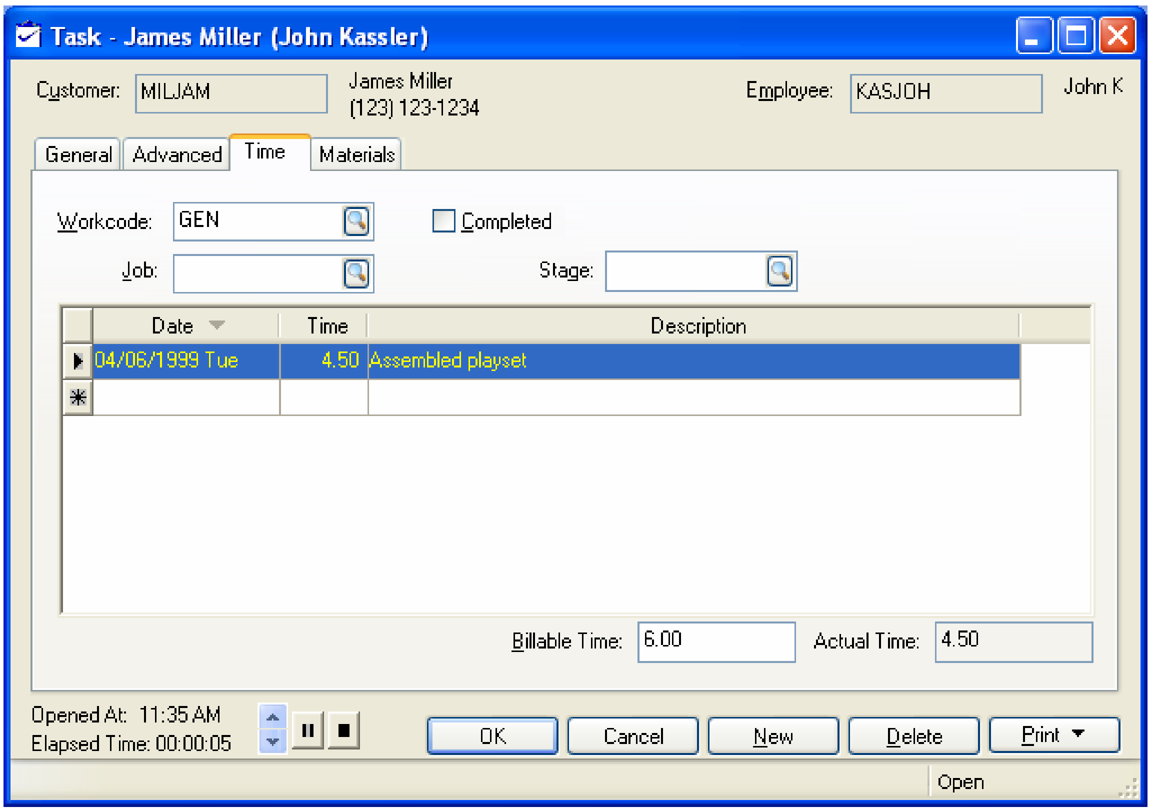
Review the Expenses > Purchase Orders > Receive Items against a Purchase Order section of the main manual for more details about purchase orders and unfulfilled sales orders.

Recording Labor and Completing the Task

An important step in managing a work order or task is to properly record labor and notes within a task. This information can be entered directly into the task window if the repair personnel have access to a computer. A secretary can enter time after the job is completed if the technician records his time on a printed work order. Review the Printing Tasks and Work Orders section for details on hard copy work order options.

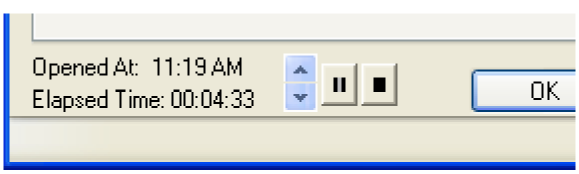
Entering Time

The amount of time and a description of the project should be recorded within the **Time** tab of the task as shown below:



The **Date** will default to today's date. This date should reflect the date the work was performed.

Enter the amount of **Time** spent on the job. The **Time** can be derived from the task timer. This timer is located at the bottom of the task dialog as show below:



The stop button  will copy the **Elapsed Time** to the **Time** entry within **Time** tab. The pause button  will cause the timer to pause until the play button  is clicked.

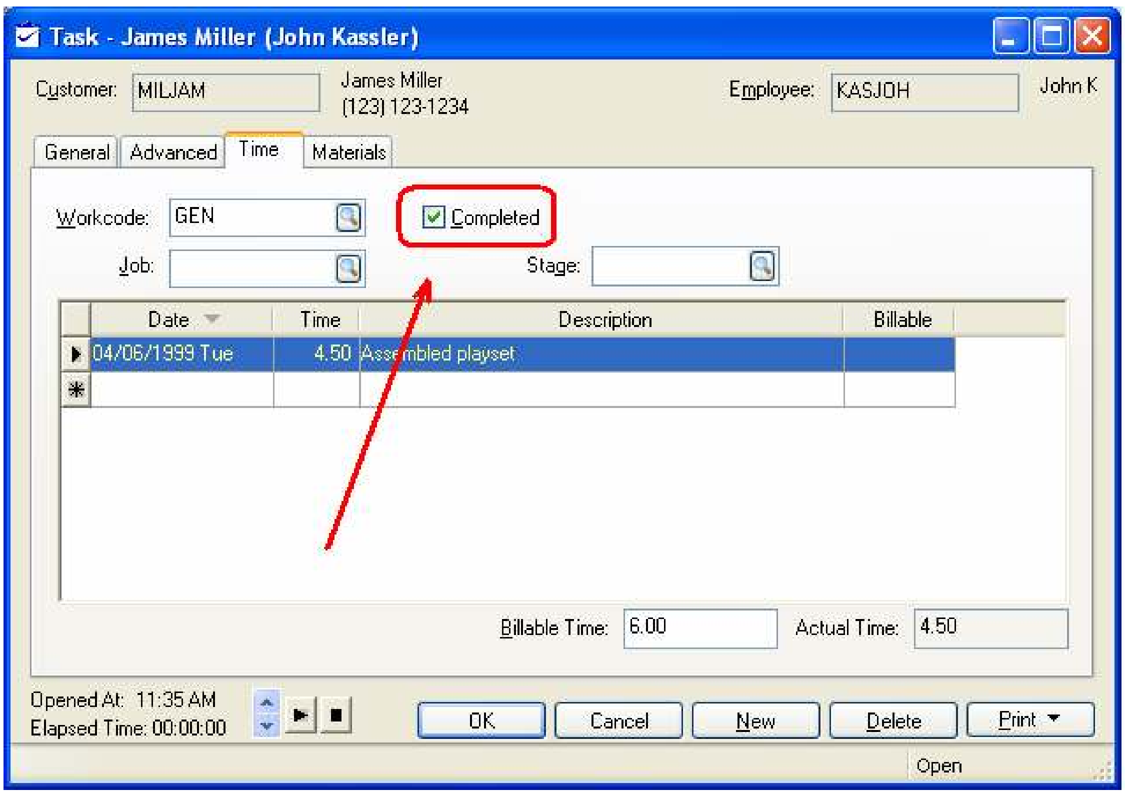
Use the directional arrows  **to add or reduce minutes within the timer.** The task timer starts when a task is opened with the exception of tasks with a base type of **Phone**. Review the Creating Task Types and Defaults section for more details on the phone type.

The **Actual Time** value is derived from the total of the **Time** column.

The **Actual Time** value within the time tab of a task may affect the **Billable Time** which may adjust values on the billing invoice. Review the Time and Material tasks vs. Contract Tasks section for more details on how the **Billable Time** is affected by the **Actual Time**.

Completing a task

A task is marked completed by enabling the **Completed** option within the **Time** tab as shown below:



The completed option affects the status of the task. Review the Task Status Settings section for more details on task status options.

The completed switch is frequently enabled by the technician or the secretary that is entering the technicians' time. A separate approval step is recommended if a manager reviews the total time spent on a task before the billing occurs. Review the Approving Tasks section for more details.

Approving Tasks

The approval process within the EBMS task module is an optional step that is used by a manager. This process is useful in the following situations:

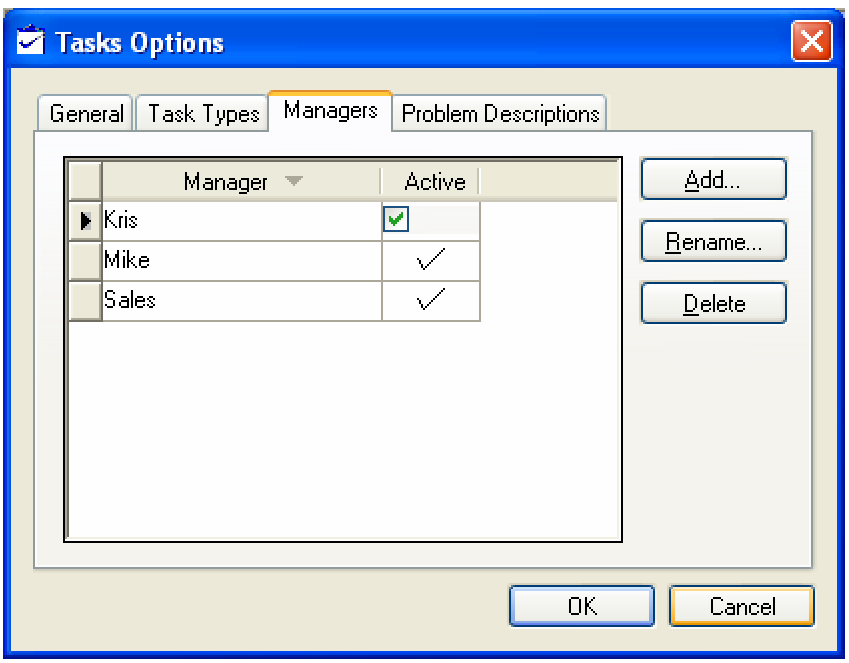
- The manager reviews and approves each task or work order before the task is invoiced.
- A manager is required to review all tasks when tasks are completed.
- The approval step is required to verify that the billable time is properly set for employee bonus or commission payments.
- A manager wishes to review all work orders that are completed for a larger project or are specific to individual employees.

The approval process consists of two features; the manager settings and the approval process. Review both sections to properly implement the approval process.

Manager Settings

The EBMS task module allows the user to setup managers to review and approve groups of tasks. The manager settings can be used to group tasks even if the approval process is not implemented.

Select **Tasks > Options** from the main EBMS menu and select the **Managers** tab as shown below:



Click on the **Add** button to create a new manager. The **Active** option must be enabled to use the manager within a new task.

Complete the following steps to set the proper manager within each task type:

1. Click on the **Task Types** tab

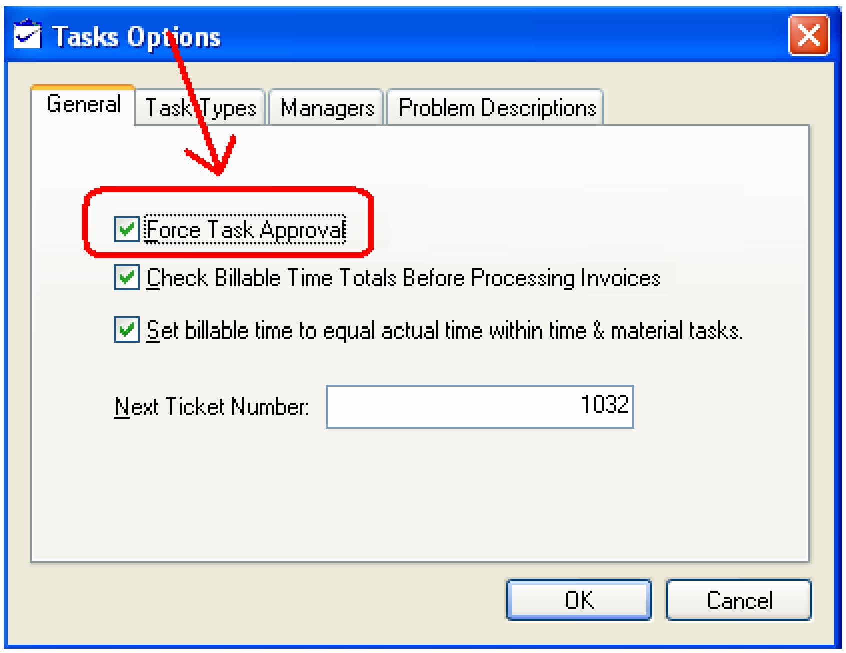
2. Select a type
3. Click on the **Edit Defaults** button
4. Click on the **Advanced** tab
5. Set the appropriate **Manager** for the task type

Repeat steps 2 through 5 for each task type.

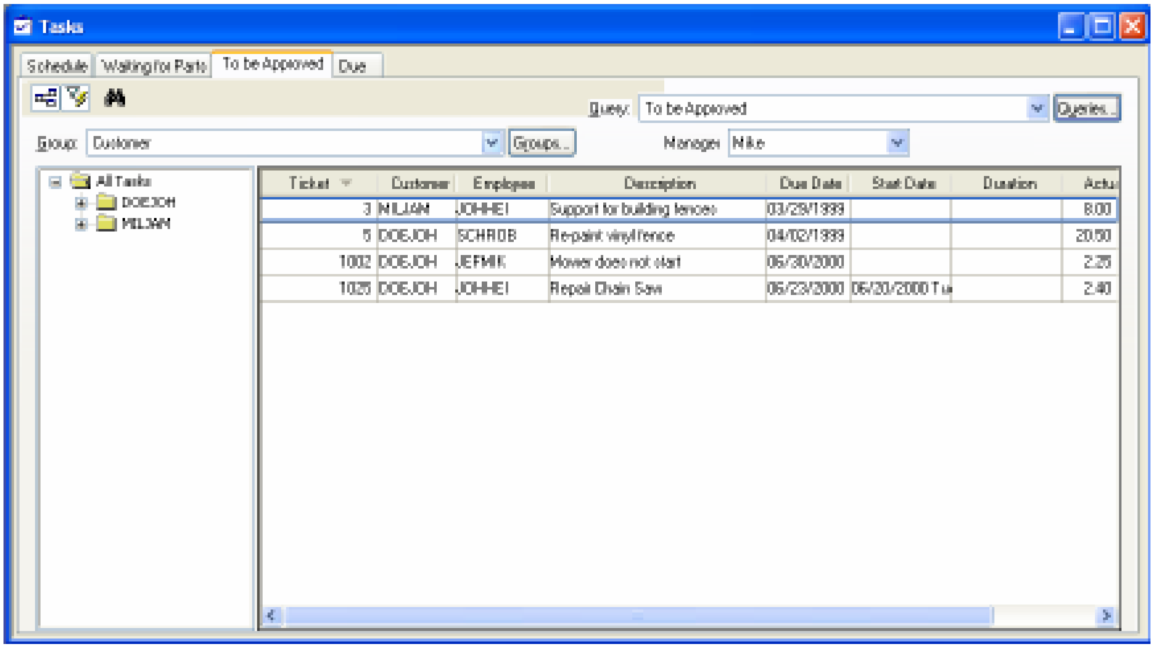
Tasks can be grouped based on manager for scheduling, approval, or general management purposes.

Approving Tasks

The first stop in implementing the approval step within the EBMS task system is to enable the **Force Task Approval** option. Select the **Tasks > Options** from the main EBMS menu and click on the **General** tab.



Create a task list view within the main task widow (**Tasks > Tasks**) labeled *To be Approved* as shown below:

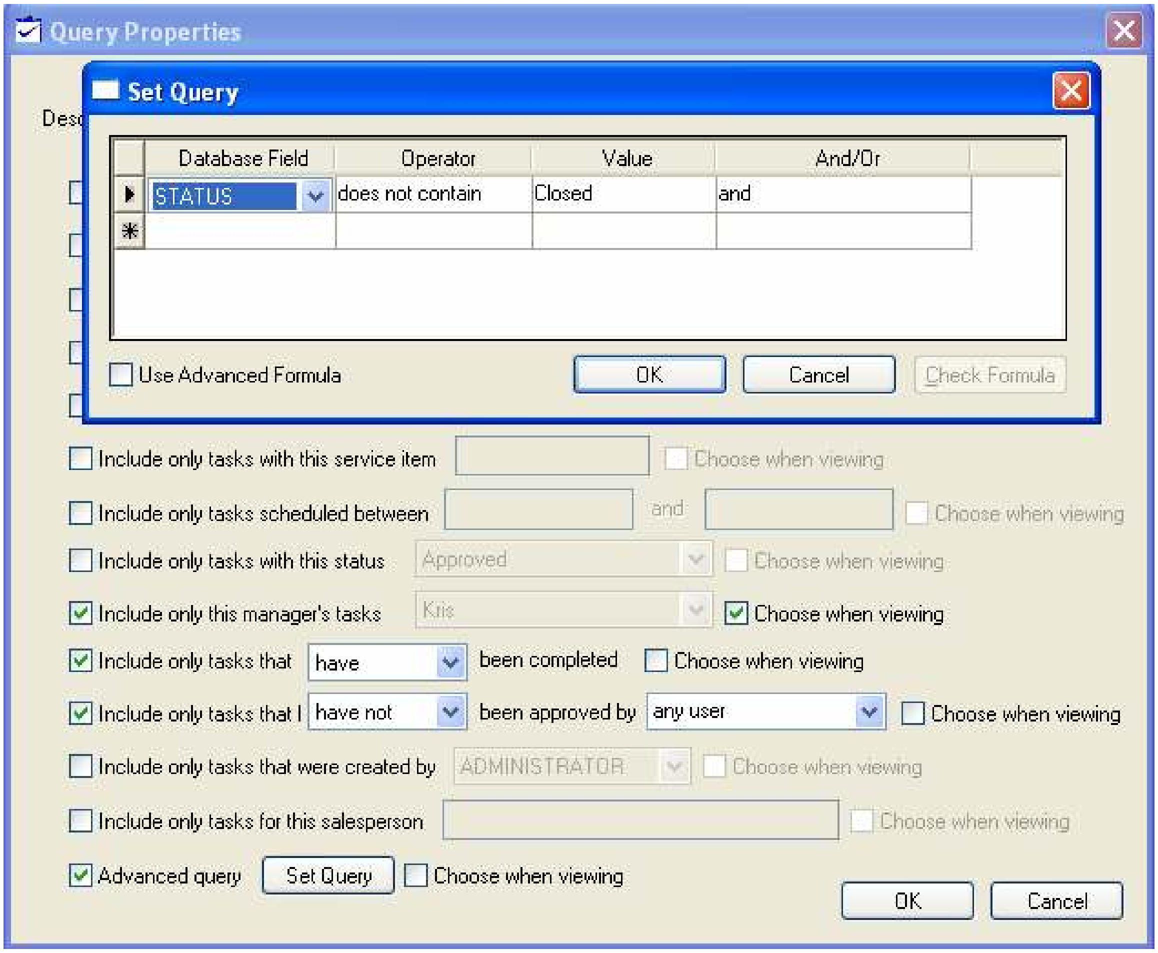


Review the Creating Queries section for more details on creating an additional view.

Set the **Query** option to the **To be Approved** setting as shown above.

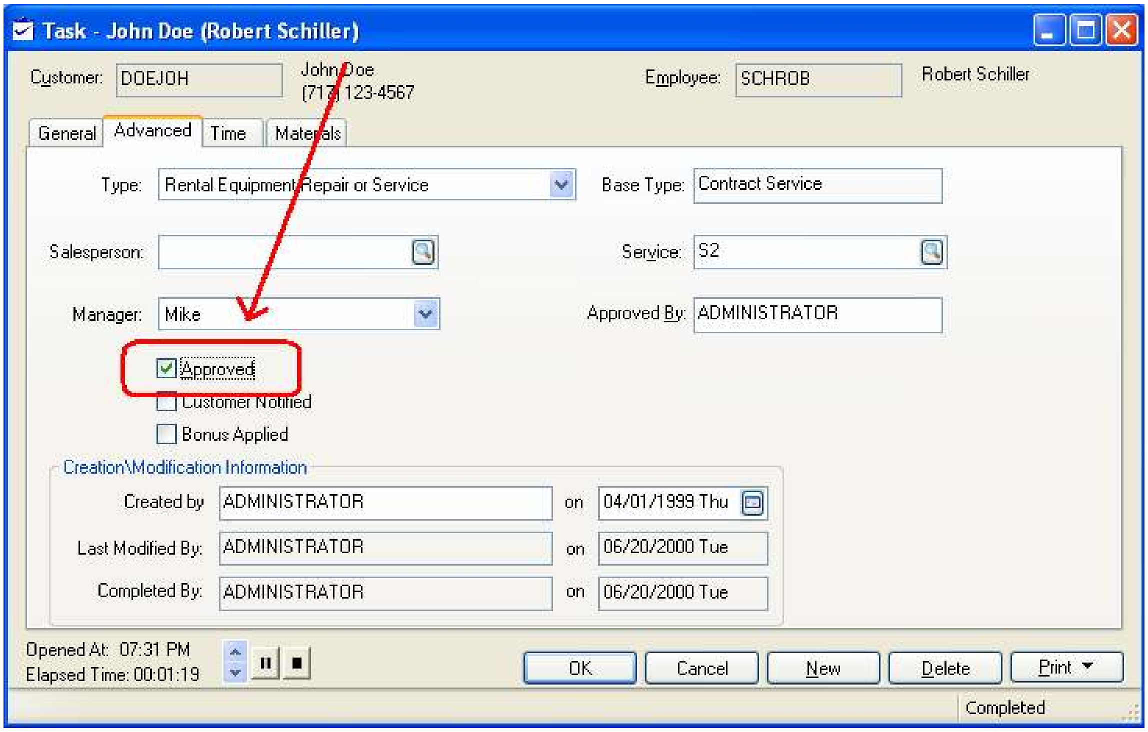
Complete the following steps to create the **To be Approved Query** if it does not exist.

1. Click on the **Queries** button.
2. Click on the **New** button
3. Enable the **Include only this manager's tasks** and enable the **Choose when viewing** option.
4. Enable the **Include only tasks that …** option and select the **have** been completed option.
5. Enable the **Include only tasks that I [have not] been approved by [any user]** option and set the appropriate settings to match the options below.
6. Enable the **Advanced Query option** and click on the **Set Query** button. Set the **Set Query** option as shown below.



The combination of these settings will show all complete tasks that are completed and have the proper manager settings. Tasks that have been closed or have already been approved will be excluded.

The manager will individually open each task, review the details, and enable the **Approved** option as shown below:



A task can not be approved if the task contains **billable Time** and no invoice is attached. Review the Billing a Project or Task section for more details on attaching an invoice and billing a project.

The user that enabled the **Approved** option is recorded in the **Approved By** entry.

Pre-approving tasks

There may be a group of tasks that do not need approval. Complete the following steps to bypass the approval process.

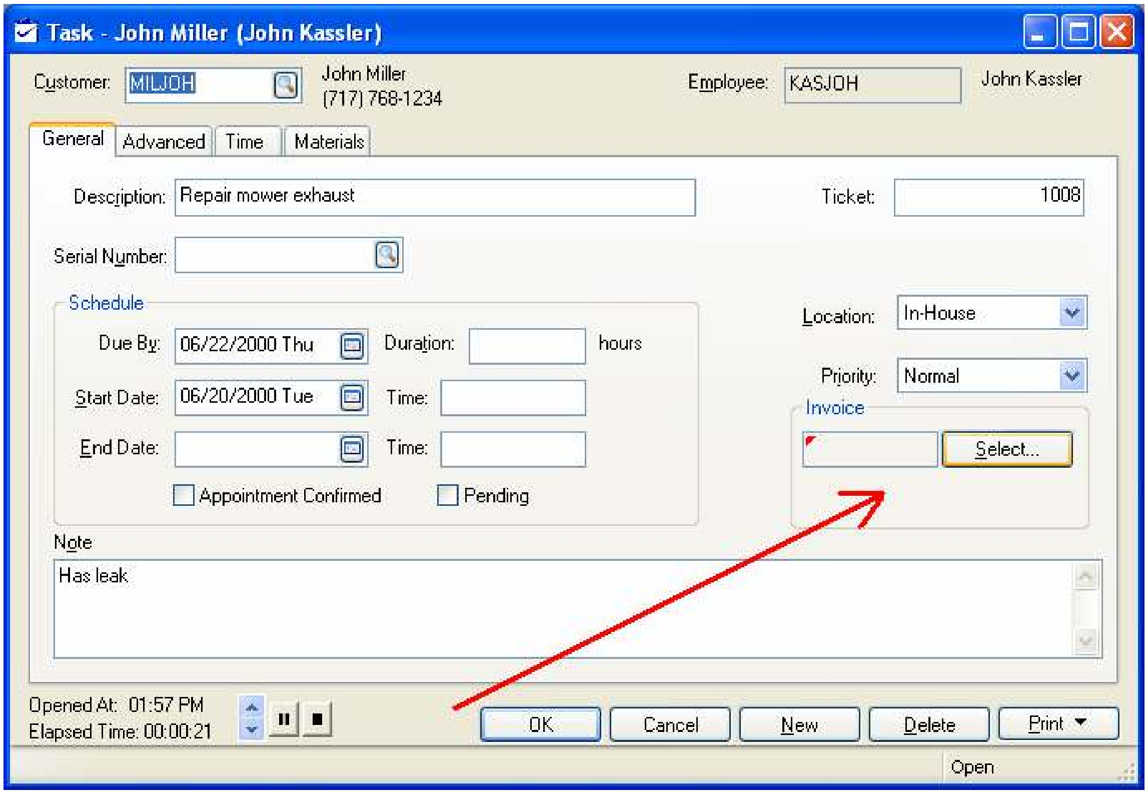
1. Select the **Tasks > Options** from the main EBMS menu.
2. Open the **Task Types** tab.
3. Select the task type that does not require approval.
4. Click on the **Edit Defaults** button
5. Click on the **Advanced** tab and enable the **Approved** option.

This step will enable the **Approved** option when a task is created. This will cause the task status to ignore the approved status when a task is completed.

Billing a Project or Task

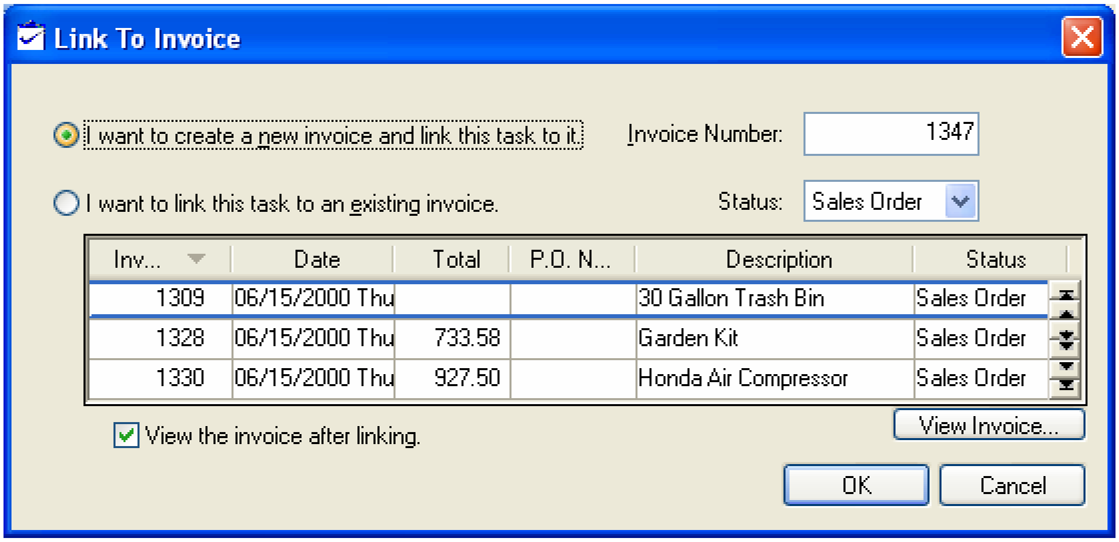
Many tasks such as sales tasks, internal projects, or support calls are not invoiced or billed. Normally, customers will only be invoiced for the tasks that contain billable time. Complete the following steps to invoice a customer for a task:

1. Click on the **General** tab of the task to identify the **Invoice** or sales order setting.



2. If the task has not been associated to a sales order or invoice the **Invoice** entry will be blank. Proceed to step 7 if the task is already attached to an invoice or sales order.

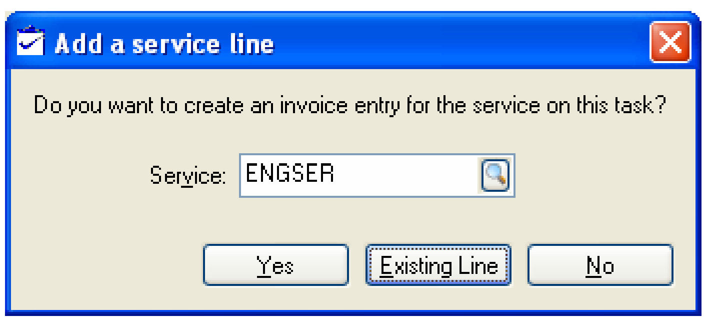
3. Click on the **Select** button on the general tab of a task to link an invoice to the task as shown above. The Link to Invoice dialog will open as shown below:



4. Select the first option to create a new sales order or invoice. Select the **I want to link this task to an existing invoice** option to append the item to an existing sales order.

   The second option allows the user to attach tasks to sales orders or processed invoices by changing the **Status** query. The recommended **Status** query is the **Sales Order** option since additional time can only be appended to sales orders. Click on an existing sales order and click the **View Invoice** button to open an existing invoice or order.

5. Click on the **OK** button and the following dialog will open if a **Service** inventory item is attached:



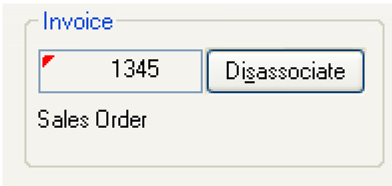
6. Click on the **Yes** button to create a new line on the sales order, **Existing Line** to add the time to an existing line with the same **Service** inventory item, or **No** to manually enter the service code line.

   The invoice will open after the wizard is completed if the **View the invoice after linking** option found on the invoice list page was enabled.

   The quantity of the service time that is inserted within the invoice is calculated using the **Estimated Hours** contained within the service items general tab. The billing items must be manually inserted into the invoice or sales order if the **Service Item** found within the **Advanced** tab of the task is blank. Review the Attaching a Task to a Service Item section for more details about the service item.

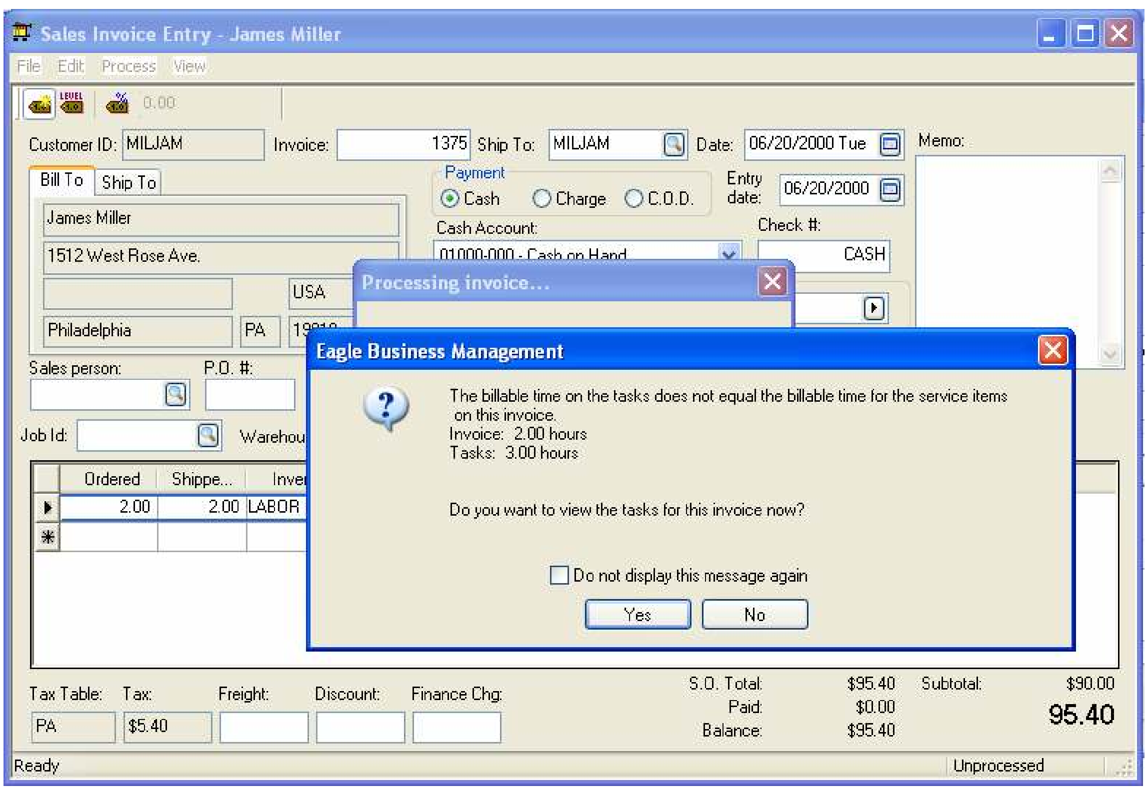
Tasks can also be attached directly from a sales order or when a proposal is used to create a sales order. Review the Creating a Task from a Proposal or Quote or Creating a Task from an Invoice sections respectively for more details.

7. Right click on the sales order or invoice number and select **View Invoice** to open the attached order. Click on the **Disassociate** button to remove the sales order from the task. Disassociating an invoice from the task will NOT delete or remove the sales order.

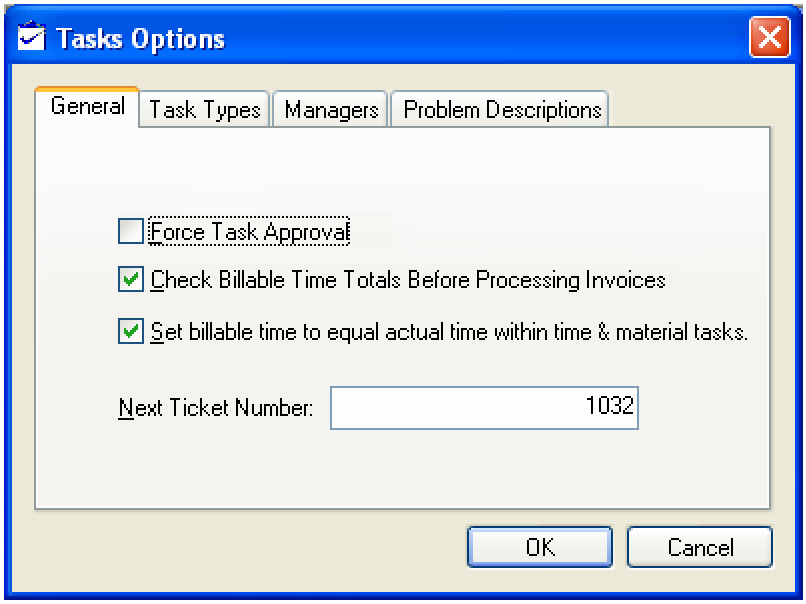


8. The invoice containing tasks is processed in a similar manner as any standard invoice. Review the Sales > Invoices > Processing a Sales Invoice section of the main manual for more details on processing an invoice.

9. The following dialog may appear if the **Billable Time** within the labor tab of the task does not match the billable time within the sales invoice. The billable time within the sales invoice is calculated by multiplying the quantity **Shipped** from the service time with the **Estimated Hours** found on the general tab of the service item.



Click on the **Yes** button to continue or click on the **No** button to change the billable time within the task. This billable hour's comparison dialog will only appear if the **Check Billable Time Totals Before Processing Invoices** option is enabled. This option is found in **Tasks > Options – General** tab.



Review the Billable Time section for more information on reporting and analyzing the billable hours of the company or individual service personnel.

Tasks with billable time can be applied to a job instead of being invoiced. Review the Using Tasks and Job Costing section for more details on tasks within a job.

Billable Time

Billable time is the amount of time that has been invoiced or billed to a customer. Labor such as sales, warranty, unbilled support, service department cleanup, driving time that is not reimbursed, and other overhead labor, is not invoiced or billed. This unbilled labor must be kept to a minimum to make a service

Managing a service company or division requires affective tools to measure the efficiency of labor and employees. Comparing billable time to the actual time is a powerful way to evaluate the profitability of individual employees or an entire service department. The task module of EBMS can help answer some of the following questions:

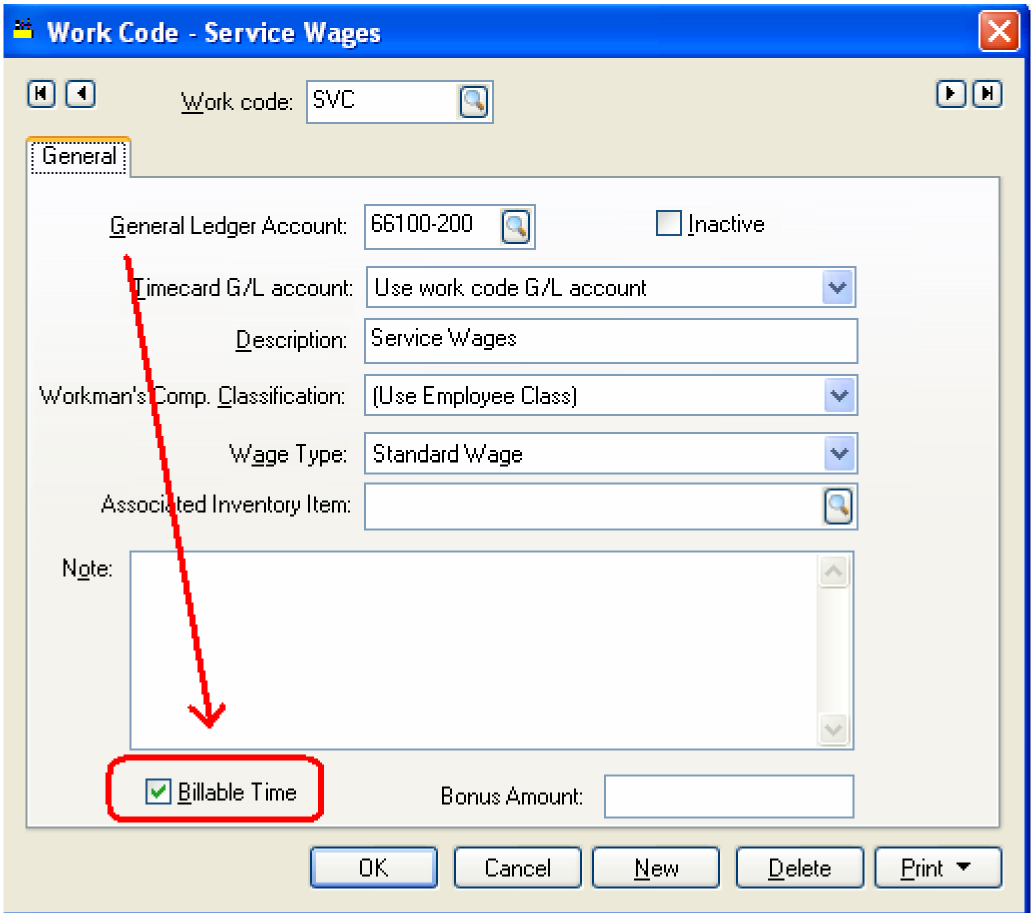
- What percentage of an employee’s time is being billed?
- Is a sufficient amount of time allocated to a task to cover overhead labor costs such as scheduling, driving (for on site projects), management, and other labor that is not billed.
- Is the employee completing enough of tasks to be profitable?

The following types of businesses find that labor management is very important element in managing the profitability of the company.

- General services that are labor intensive
- Repairs and maintenance
- Professional services
- Time & Material (T&M) services
- Smaller custom manufacturing tasks (The job Costing option of EBMS is a tool that can be used to manage labor within individual larger projects)

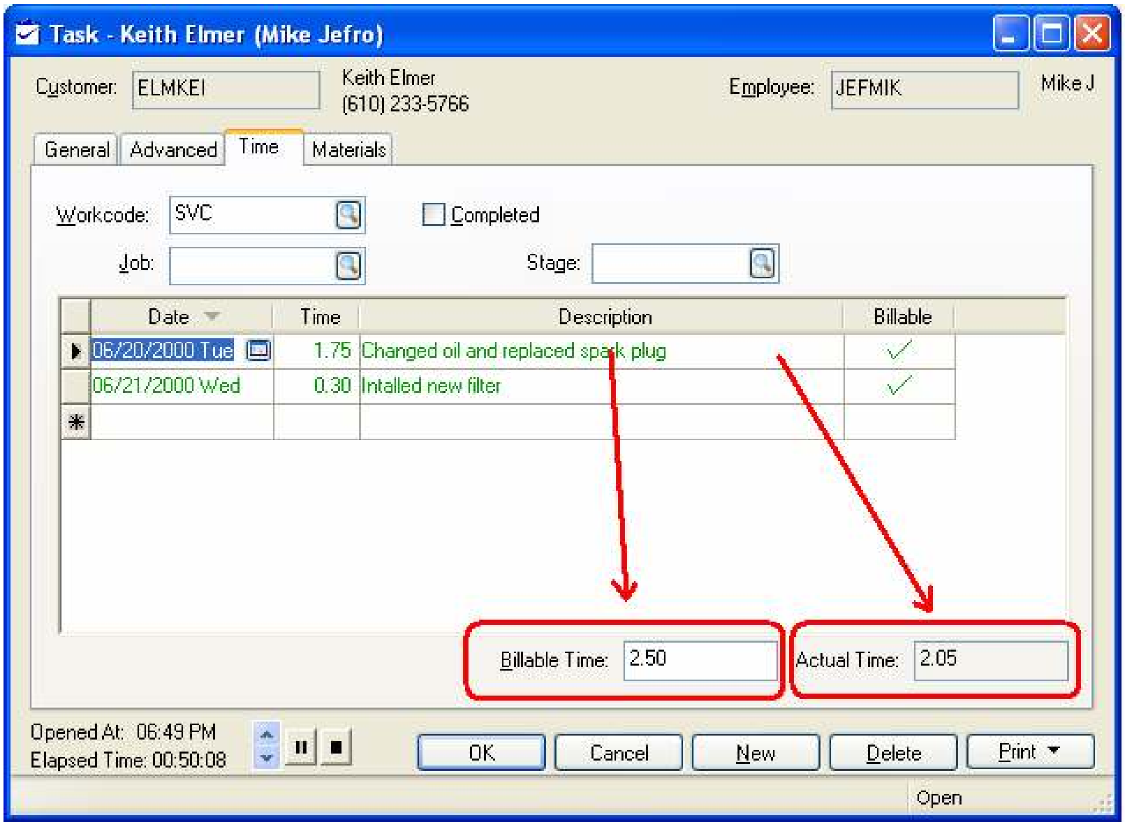
The following settings are important settings when tracking billable time.

A. The **Billable Time** setting within the work code record should be set accordingly. Select **Payroll > Work Codes** from the main EBMS menu to open the work code dialog as shown below:



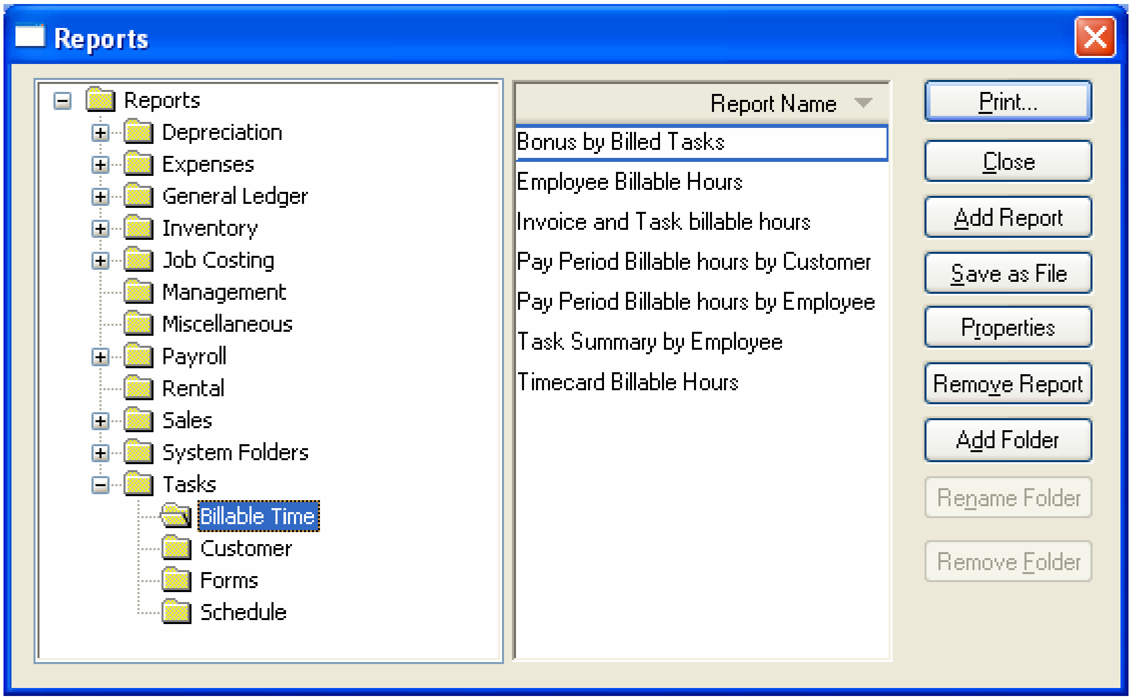
Enable the **Billable Time** option for all labor that is invoiced. All service labor including time and materials (T&M) or labor done based on a contact should have this option enabled. Payroll work codes such as clerical, sales, cleanup, or other overhead work codes should have the **Billable Time** disabled.

B. The **Billable Time** found within the **Time** tab of the task is an important entry to properly evaluate billable time.

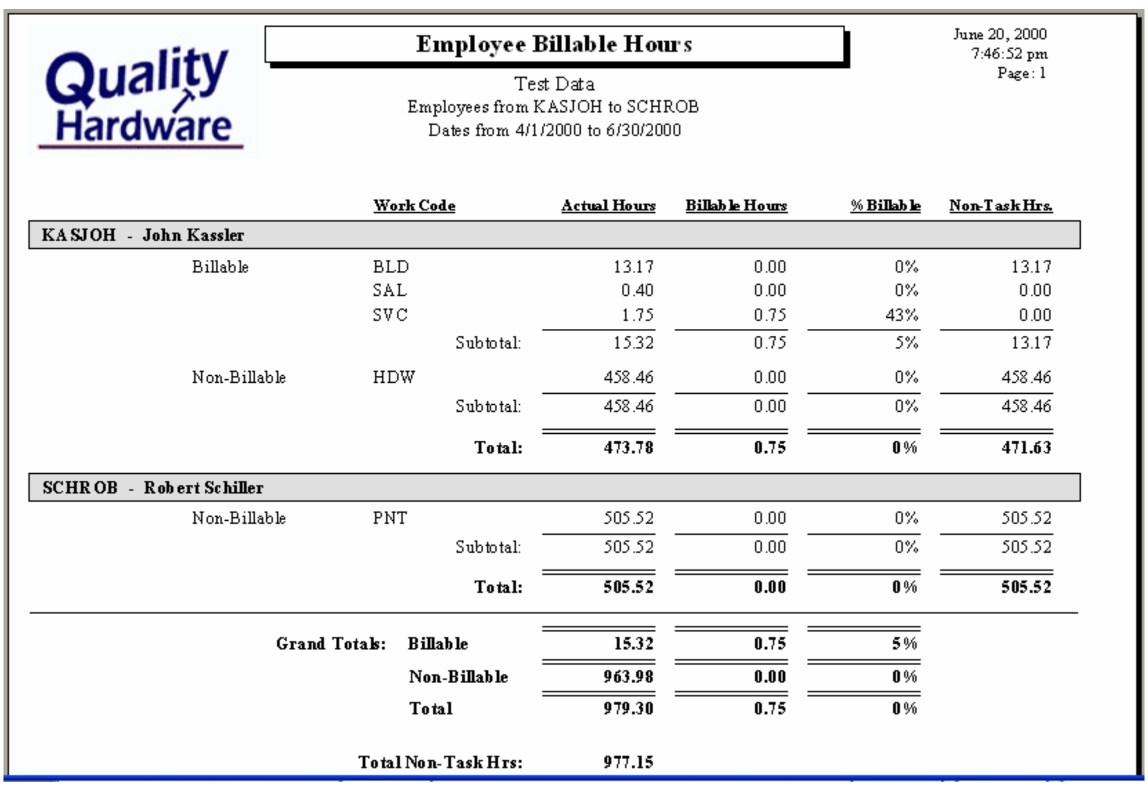


The **Actual Time** is calculated from the time entered into the **Time** tab. Review the Time and Material tasks vs. Contract Tasks section for an overview on how billable time is recorded.

A variety of reports are available to evaluate billable time within the EBMS software. Select **File > Reports** from the main EBMS menu. Select **Tasks > Billable Time** from the menu.



The **Employee Billable Hours** report appears as follows:


Quality Hardware

Employee Billable Hours

June 20, 2000
7:46:52 pm
Page: 1

Test Data
Employees from KASJOH to SCHROB
Dates from 4/1/2000 to 6/30/2000

		Work Code		Actual Hours	Billable Hours	% Billable	Non-Task Hrs.
KASJOH - John Kassler							
	Billable	BLD		13.17	0.00	0%	13.17
		SAL		0.40	0.00	0%	0.00
		SVC		1.75	0.75	43%	0.00
			Subtotal:	15.32	0.75	5%	13.17
	Non-Billable	HDW		458.46	0.00	0%	458.46
			Subtotal:	458.46	0.00	0%	458.46
			Total:	**473.78**	**0.75**	**0%**	**471.63**
SCHROB - Robert Schiller							
	Non-Billable	PNT		505.52	0.00	0%	505.52
			Subtotal:	505.52	0.00	0%	505.52
			Total:	**505.52**	**0.00**	**0%**	**505.52**
	Grand Totals:	**Billable**		**15.32**	**0.75**	**5%**	
		Non-Billable		**963.98**	**0.00**	**0%**	
		Total		**979.30**	**0.75**	**0%**	
			Total Non-Task Hrs:	**977.15**			

The following report compares hours for each invoice:

Quality Hardware

TA Invoice and Task billable hours

Test Data

Begin Invoice Date-6/1/2000, End Invoice Date- 6/30/2000

June 20, 2000
7:51:40 pm
Page: 1

Invoice Date	Invoice	Customer Id	Custromer Name	Estimated Hours	Billable Hours	Actual Hours
6/15/2000	1328	DOEJOH	John Doe	0.00	0.00	0.00
6/20/2000	1348	ELMKEI	Keith Elmer	0.00	2.50	2.05
6/20/2000	1360	DOEJOH	John Doe	0.75	0.00	0.40
6/20/2000	1362	DOEJOH	John Doe	0.75	0.75	0.00
6/20/2000	1364	DOEJOH	John Doe	1.00	0.00	0.00
6/20/2000	1375	MILJAM	James Miller	2.00	3.00	8.00
				4.50	**6.25**	**10.45**

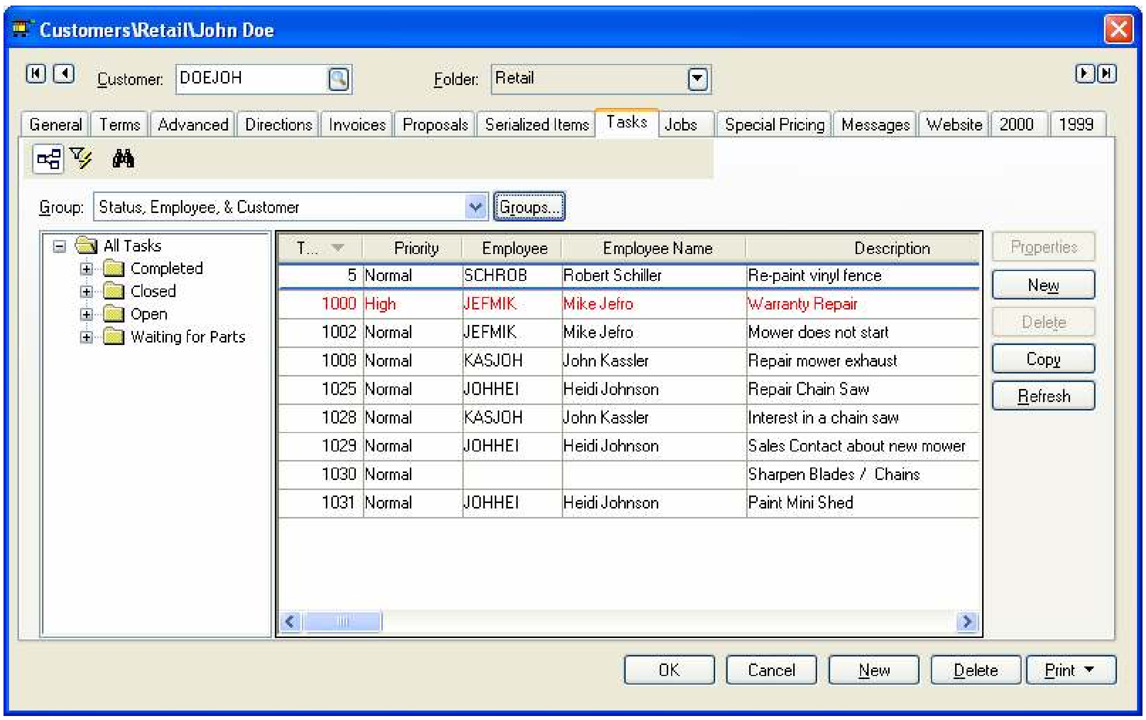
There are many additional reports that allow the manager to evaluate billable time.

Reviewing Task History

Tasks can be viewed and edited from a variety of sources besides the main task view window (**Tasks > Tasks**).

Some additional views are listed below:

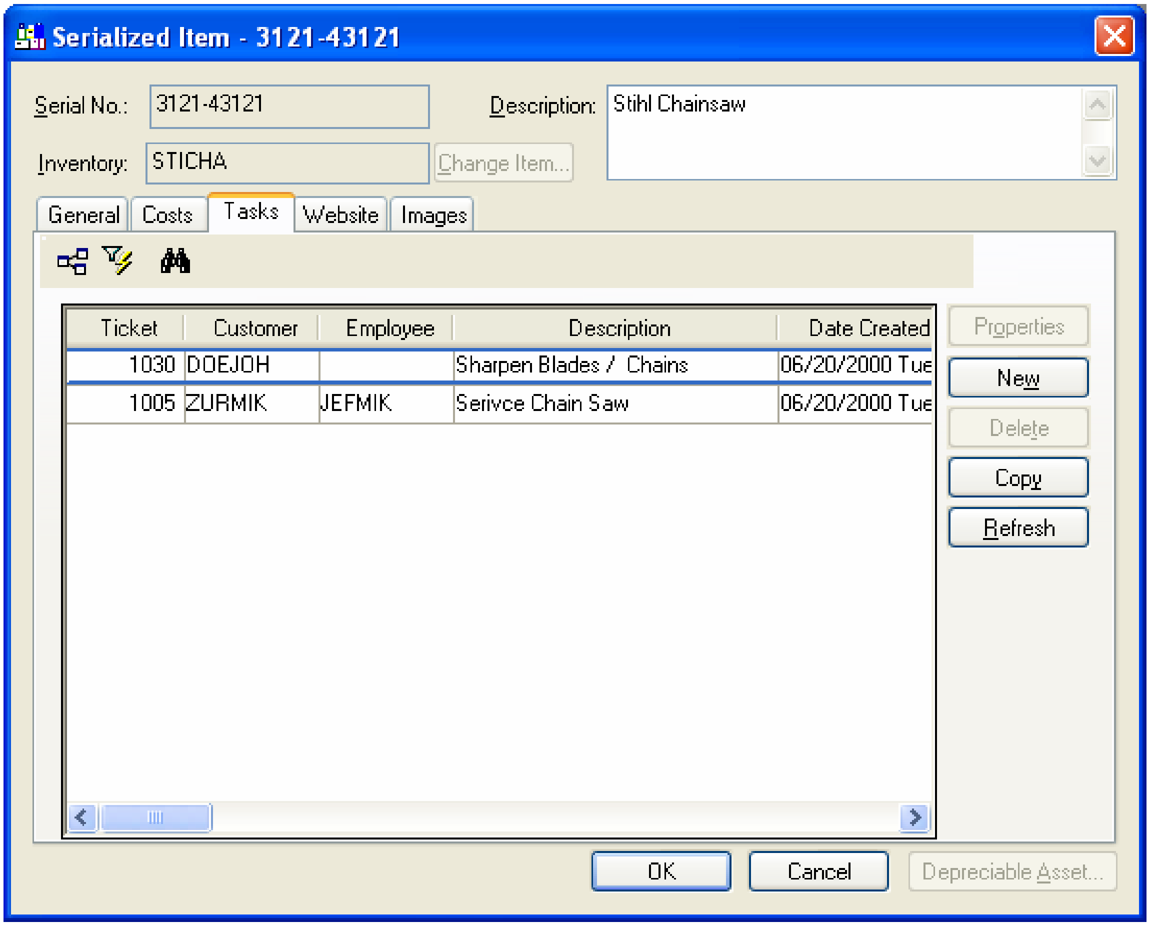
- Tasks by Customer - Click on the **Tasks** tab of the customer record as shown below:



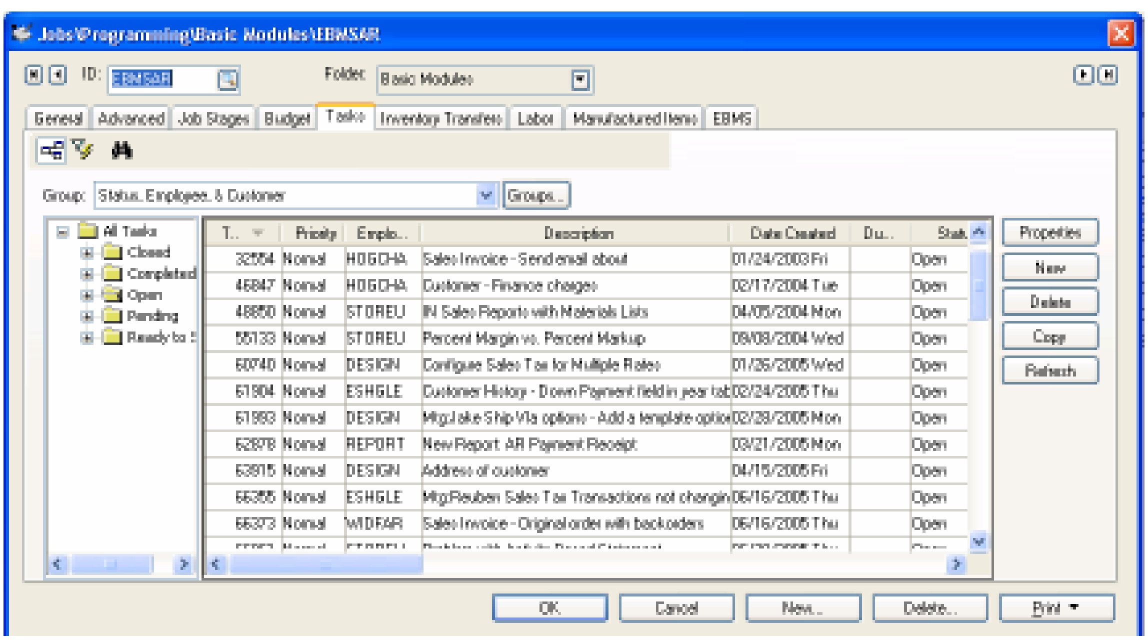
  This view is useful when evaluating tasks for a specific customer. Review the Creating Task Groups and Creating Queries sections for more details on grouping and querying tasks.

- A task by Serialized Items – This view is used to see the service history for specific pieces of equipment. The user needs the optional **Serialized Items** module installed to use this option. Alls tasks will be listed for a serialized item entered on the general tab of the task. See **Serial Number** field below:

Click on the **Tasks** tab of the serialized item to list tasks as shown below:



- Tasks by Job – Click on the **Tasks** tab of a job



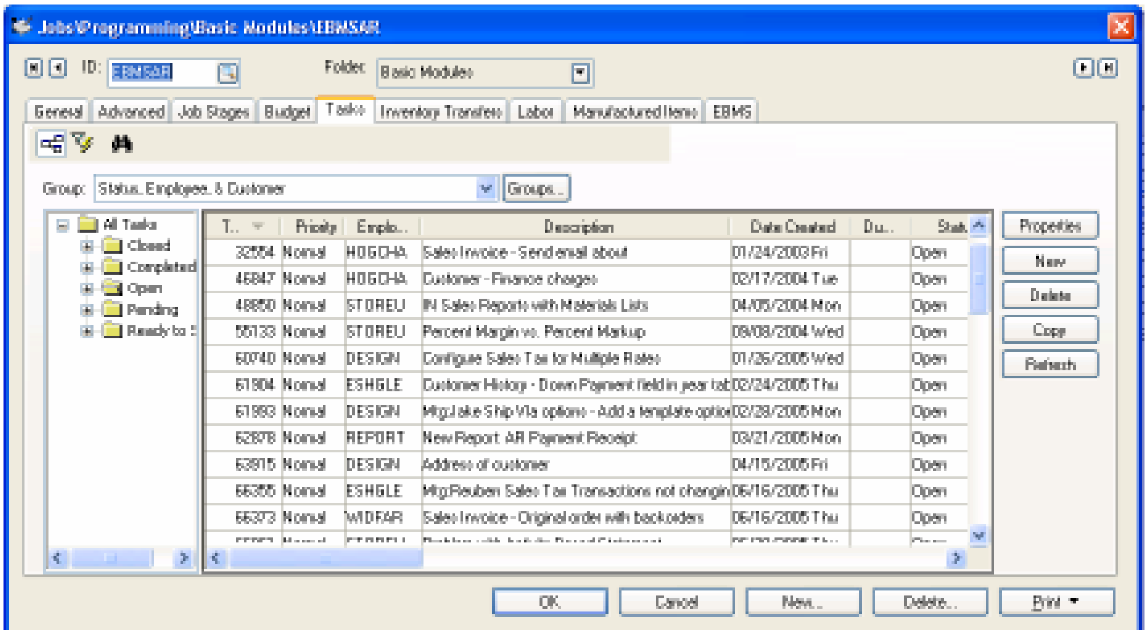
Review the Using Tasks and Job Costing for more details on tasks and job costing.

All these task views can be configured to group tasks in a convenient manner. Review the Creating Task Groups and Creating Queries sections for more details on grouping and querying tasks.

Using Tasks and Job Costing

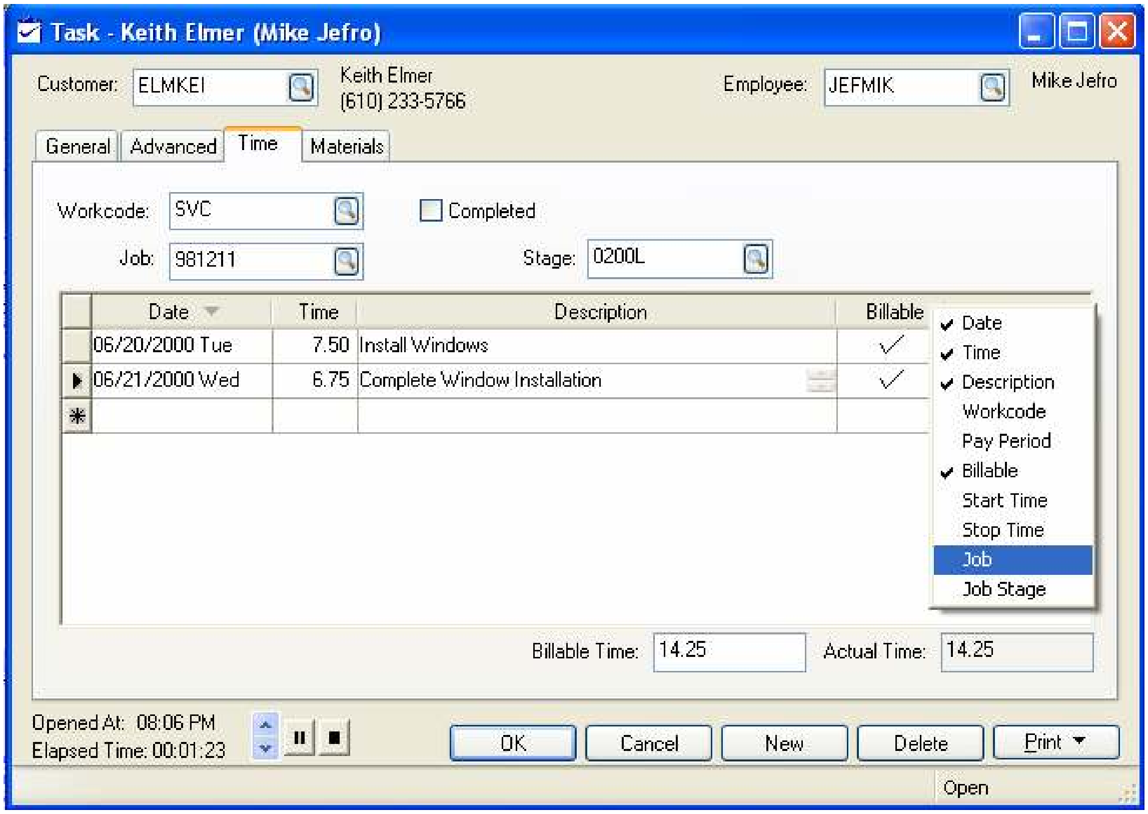
The task module can be an excellent enhancement to the option EBMS job costing module. Tasks can be used to schedule and track labor within a construction or manufacturing job. Tasks can also be used to track labor within a job that manages a contract such as an annual service contract.

A task tab will appear for each job that allows the user to view the tasks within a task.



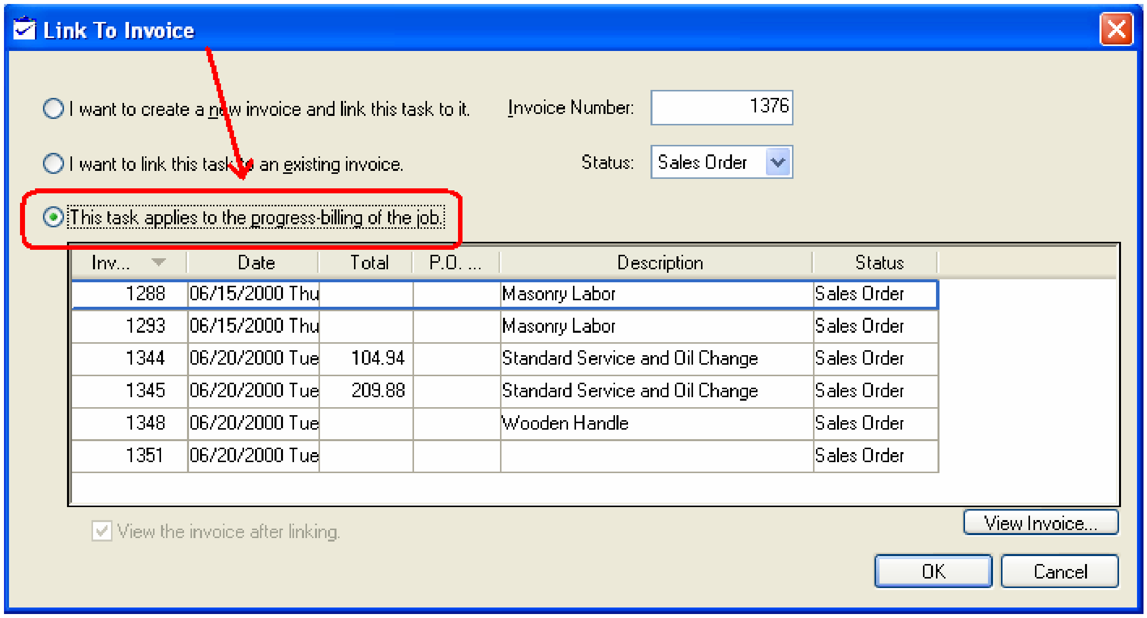
The tab allows the user to group or query the tasks within the tab.

The **Job** and **Stage** information is recorded within a **Time** tab of the task as shown below:



The **Job** and **Stage** can be set per employee time line by displaying the **Job** and **Job Stage** columns as shown above. Review the Recording Labor and Completing the Task section for more details on entering data.

Billable time can be applied to a job rather than billed to a customer. The **Select** button on the **General** tab can be used to apply the time to a job. The **This task applies to the progress-billing of the job** option will only appear if a job is entered in the **Time** tab of the task.



Review the Billing a Project or Task section for more details on this invoice wizard.

Review the Job Costing manual for more details on job costing.

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