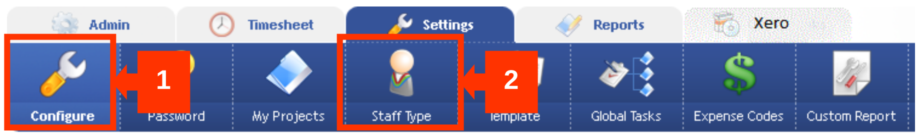
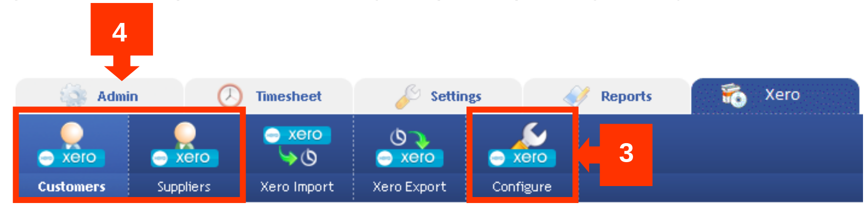
Quick Guide to Getting Started (with Xero)

Before your Staff can start using your TimePro system, you (as the Administrator) need to complete the following simple steps. Log on to your TimePro system with the initial Admin Logon that has been provided.





Step 1: Configure the Settings

Review configuration options in all categories as shown on the screen.

Step 2: Define Staff Types - Admin, Contractor, Salary …

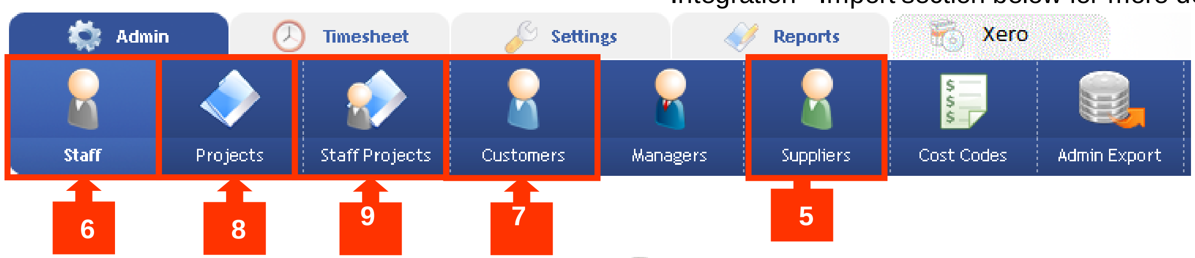
Review the default Staff Type listings and add new types if necessary.

Step 3: Configure Xero Settings

Set configuration options to match your requirements such as the Sales Invoice Number Prefix and the Purchase Invoice Number Prefix.

Step 4: Add Xero Customers & Suppliers

The quickest way is to set up these records is to import them into TimePro (using the Xero Import) rather than adding them individually. See Xero Integration - Import section below for more detail.



Step 5: Add Suppliers ie. Contractor type staff

If you have any Contractor-type Staff then you should add your Suppliers next. You will need to match the Contractor record to the appropriate Xero Supplier record that you had set up in Step 4.

Step 6: Add Staff

Add your Staff. *HINT - Make use of Global Projects and/or copy features to save time when setting up your Staff and Projects.*

Step 7: Add Customers

Add your Customers. You will need to match the Customer record to the appropriate Xero Customer record that you had set up in Step 4.

Step 8: Add Projects

Add your Projects.

Step 9: Allocate your Staff to Projects

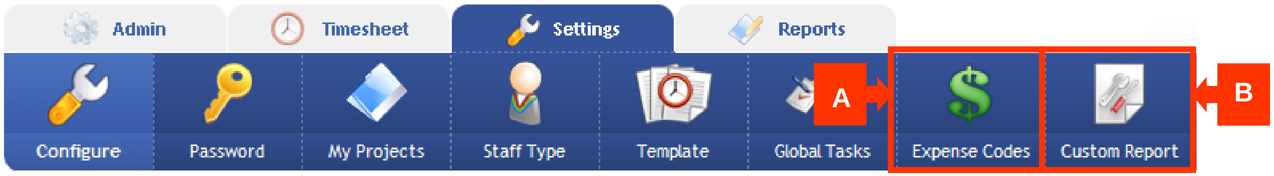
Allocate staff to your Projects. *HINT - If you have used the Global Projects function when setting up your Staff and Project records, then this function would have already allocated Staff to your Global Projects.*

Basic Setup is Now Complete!

You can now inform your Staff that they can start using the system. If you have entered email addresses for all your Staff, then you can use the Email notification facility in TimePro to send out a customised welcome message.

Additional Setup Steps

These steps can be undertaken in any order.

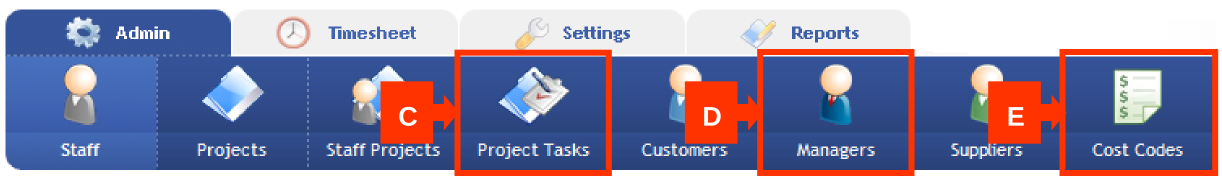


A. Add Global Tasks

If you chose to use "global" Tasks in the "Time Entry Text Option" when configuring TimePro, then you can add your **Global Tasks** now.

B. Add Expense Codes

If you turned on "Track Expenses" and if you wish to categorise/code your expenses, then you can add your **Expense Codes** now.



C. Add Project-specific Tasks

If you turned on "Use Project-Specific Tasks" when configuring TimePro, then you can add your **Project-Specific Tasks** now.

D. Add Managers

If you turned on "Use Authorisation" when configuring TimePro, then you can add your **Managers** now. *Note: once you have defined your Managers you should assign them to the* ***Projects*** *they are responsible for.*

E. Add Cost Codes

If you turned on "Apply Cost Tracking to Staff Projects" when configuring TimePro, then you can add your Cost Codes now. *Note: once you have defined your Cost Codes you should apply them to the Projects your Staff work on.*

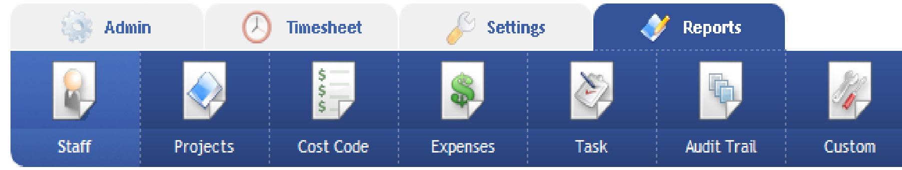
Hints & Tips

If you have a significant volume of data to set up in the system, such as 50, 100 or even 200 or more staff, projects or customers, then it may be more economical to have your staff imported directly into the system for you by a TimePro consultant. The data to be imported should be provided to TimePro in a CSV or TAB delimited format. Note: There is usually a charge for this service.

Check out the TimePro Logon Anywhere Feature if you would like flexibility in how you log on to your TimePro system. This allows you to log on to TimePro directly from your existing web site or Intranet.

Further Information for Administrators

Now that you've got your TimePro system up and running what should you do next? You will be using the following key areas of TimePro on a regular basis to help ensure that your timesheet system is running efficiently with as little effort as possible. Follow the links to take you to our online help.



Monitoring your TimePro system

Use the **Check Timesheets** screen to keep an eye on who has entered and completed their timesheets and more importantly, you can also send reminder emails to Staff who have not.

On the **View Timesheet** screen you can select any of your Staff members and enter or make adjustments to their time entries.

Retrieving information from the system: Batch Print

Use the **Timesheets Batch Print** facility to print out timesheets for your Staff to send out with your invoices. Timesheets can be printed for Staff on a project-by-project basis (ideal for invoicing) or on a consolidated Staff timesheet. You can also control the information that is displayed on the timesheet by choosing between the various Print templates. *Note: The View Timesheet screen can only print a timesheet for a single Project and a single Staff member at a time.*

Retrieving information from the system: Exports

Depending on your requirements you may find the **Data Export** useful if you need to export your timesheet or expenses information to another system or to analyse the data in a spreadsheet program such as MS Excel.

TimePro Drill Down Data Viewer

Use the **Drill Down Data Viewer** found on many of the screens and reports within TimePro for a quick check of the underlying data records behind any of the figures you see.

TimePro Reports

Review the numerous reports available in the TimePro system to determine which ones best match your requirements.

- Staff Reports
- Project Reports
- Cost Code Reports
- Task Reports
- Audit Trail Report

Note : If you have a very specific reporting requirement that is not covered by the standard TimePro Reports, then you can contact the TimePro Support to have a custom report developed for your business.

Giving non-Admin Staff Access to Certain Administrator Functions

If you wish to release some of the TimePro reports and or TimePro Admin screens to non-Admin users then you can do so on the **Custom Reports Setup** screen. This allows you to setup a pseudo "third" level of access to the TimePro system by giving certain users access to Administrator features of your choosing.

TimePro Compact Interface

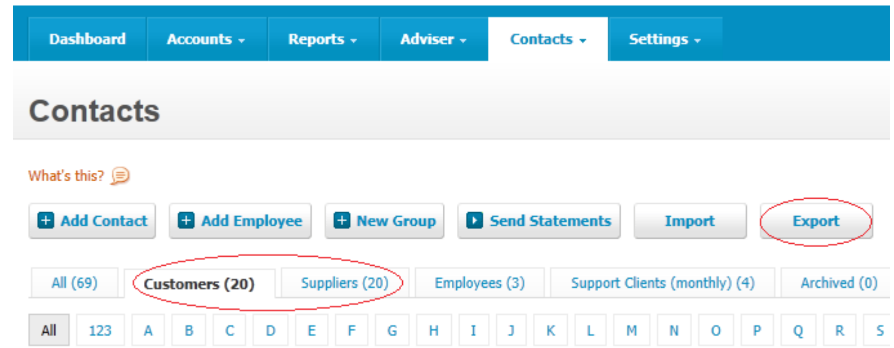
This Compact Interface makes TimePro accessible to users of mobile PDA devices. It has a neat and reduced entry interface with all the core time entry functionality on the desktop. It operates on a Weekly timesheet view, with time entered on a daily basis and in worked hours format. *Note: There is no facility for submitting a timesheet via the Compact Interface. You will still need to log in to TimePro to submit a timesheet.*

Xero Integration - Import

The Xero Import facility gives you the ability to take the Customer and Supplier records in Xero and to import these records into TimePro.

Step 1: Export Xero data

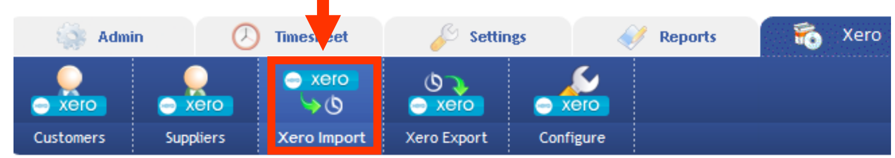
Login to your Xero account and select Contacts. Choose Customers or Suppliers and press Export. Save the .csv file on your computer, it will be accessed in the next step for importing into TimePro.

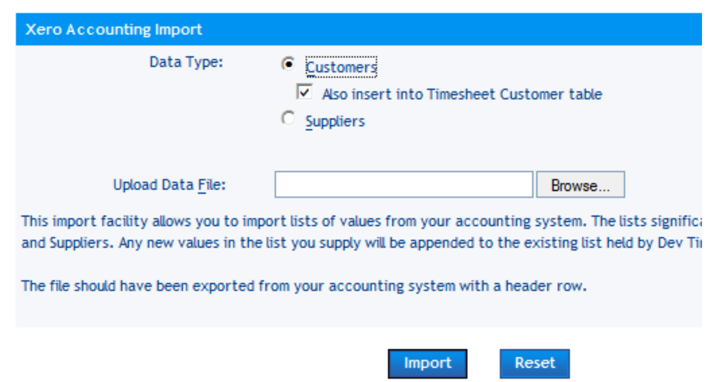


Step 2: Import Xero data into TimePro

Go to the Xero tab in TimePro and choose the Xero Import option on the application toolbar. Select Customers or Suppliers and browse to the .csv file saved in Step 1.

Press Import to copy the records from the .csv file into TimePro.





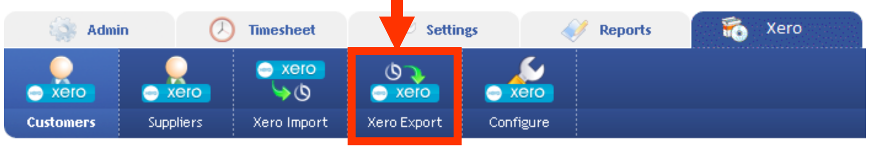
Xero Integration - Export

INTERTEC TimePro

The Xero Export facility gives you the ability to take the time records entered into TimePro and to export these records for generating Sales Invoices and/or Purchases Invoices in Xero. TimePro records are first exported in a .csv file which is then imported into Xero

Step 1: Export TimePro data

Go to the TimePro Xero Export option on the application toolbar. Select Sales Invoices (Accounts Receivable) or Purchases Invoices (Accounts Payable).
Only Time records that have been marked as "Completed" are included as part of the export process. Therefore it is a good idea to use the
Check Timesheets screen to check that staff have "Completed" their timesheets and to lock all timesheets before running an export.



Step 2: Import TimePro data into Xero

The next step is to import the TimePro data (either Accounts Receivable or Accounts Payable) into Xero using Xero Import Facility – select Xero when prompted to choose the system you are importing from. Next browse to the file saved in Step 1 and once name appears alongside the Browse button then press Import.
Important: perform a backup of your Xero information by exporting the data out before starting the import.