

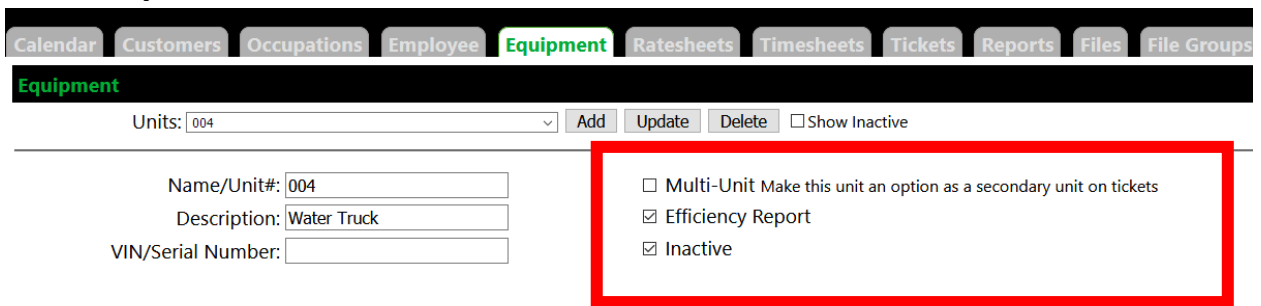


Ticketing Application Manual

Contents

Equipment Options	3
Membership	3
Adding Equipment.....	4
Add Membership.....	6
Marking Equipment as Inactive	8
To Mark Equipment as Active	9
Adding and viewing current Ratesheets and rates	10
Add a new Ratesheet	11
Adding Rates.....	12
Duplicate Entry in Rate Sheets.....	15
Add Category	16
Adding a SubCategory	17
Applying Ratesheets to specific projects.....	20
Add Timesheets as Employee	21
Edit Timesheets as Employee	22
Delete Timesheets as Employee	23
Reviewing Timesheets as Administrator	25
Add Tickets	26

Equipment Options



Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets Reports Files File Groups

Equipment

Units: 004 Add Update Delete ☐ Show Inactive

Name/Unit#: 004
Description: Water Truck
VIN/Serial Number:

☐ Multi-Unit Make this unit an option as a secondary unit on tickets
☒ Efficiency Report
☒ Inactive

1- Equipment Options;

- a. Marking the equipment as a “Multi-Unit” allows it to be selected as a secondary unit on tickets
- b. Marking a unit for “Efficiency Report” makes it appear on the equipment hours report
- c. Marking a unit as “Inactive” will make the unit unable to be assigned on tickets and will hide it on the equipment reports.

Membership

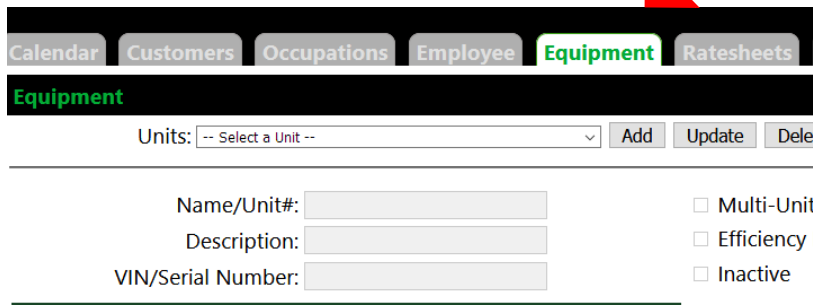
If entering in the RateSheet and you do not see the item you are wanting to assign rates to, please check that the Membership for this specific item was added

- 1- By adding Membership to the Equipment this will allow the item to show up and be selected in the Ratesheet to review the steps please visit [“Click on Add Membership”](#)

Adding Equipment

1- Open the application site:

2- Select the Equipment Tab



Calendar Customers Occupations Employee **Equipment** Ratesheets

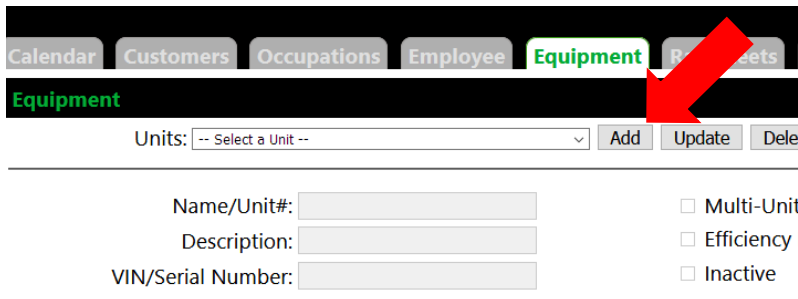
Equipment

Units: -- Select a Unit -- Add Update Dele

Name/Unit#: Description: VIN/Serial Number:

☐ Multi-Unit ☐ Efficiency ☐ Inactive

3- Click on Add



Calendar Customers Occupations Employee **Equipment** Ratesheets

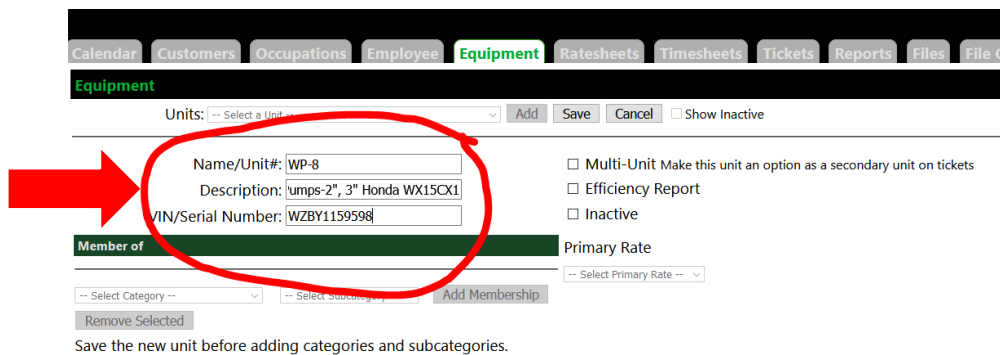
Equipment

Units: -- Select a Unit -- Add Update Dele

Name/Unit#: Description: VIN/Serial Number:

☐ Multi-Unit ☐ Efficiency ☐ Inactive

4- Enter in the details of the equipment



Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets Reports Files File G

Equipment

Units: -- Select a Unit -- Add Save Cancel ☐ Show Inactive

Name/Unit#: WP-8 Description:umps-2", 3" Honda WX15CX1 VIN/Serial Number: WZBY1159598

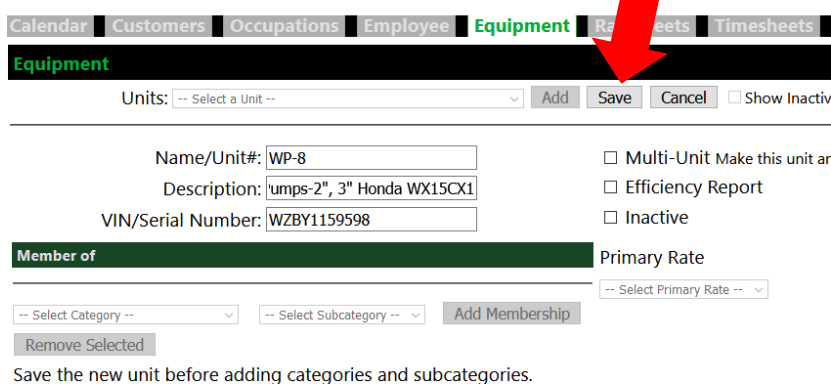
☐ Multi-Unit Make this unit an option as a secondary unit on tickets ☐ Efficiency Report ☐ Inactive

Member of Primary Rate

-- Select Category -- -- Select Subcategory -- Add Membership Remove Selected

Save the new unit before adding categories and subcategories.

5- Click Save



Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets

Equipment

Units: -- Select a Unit -- Add Save Cancel ☐ Show Inactiv

Name/Unit#: WP-8 Description:umps-2", 3" Honda WX15CX1 VIN/Serial Number: WZBY1159598

☐ Multi-Unit Make this unit ar ☐ Efficiency Report ☐ Inactive

Member of Primary Rate

-- Select Category -- -- Select Subcategory -- Add Membership Remove Selected

Save the new unit before adding categories and subcategories.

6- Click on Select Category

The screenshot shows the 'Equipment' tab selected in the top navigation bar. Below the tabs, there's a 'Units' section with a dropdown menu showing 'WP-8' and buttons for 'Add', 'Update', 'Delete', and 'Show Inactive'. The main form contains fields for 'Name/Unit#', 'Description', and 'VIN/Serial Number', each with a corresponding input box. To the right of these fields are three checkboxes: 'Multi-Unit Make this unit an option as a sec', 'Efficiency Report', and 'Inactive'. Below the 'Name/Unit#' field is a 'Member of' section with a dropdown menu labeled '-- Select Category --'. This dropdown menu is highlighted with a red circle, and a red arrow points to it from the right. Below the 'Member of' dropdown is a 'Primary Rate' section with a dropdown menu labeled '-- Select Primary Rate --' and an 'Add Membership' button.

7- Select Category from drop down list and select appropriate category

The screenshot shows the 'Equipment' tab selected. The 'Member of' dropdown menu is open, displaying a list of categories. A red arrow points to the 'Power/Hydraulic Equipment (FLE)' option, which is highlighted in blue. The list of categories includes: 'Power/Hydraulic Equipment (FLE)', 'Power/Hydraulics Equipment (FHE)', 'Skid Steer', 'Trailers', 'Trucks & Hauling', 'Vehicles', and 'Wheel Loader'. The 'Primary Rate' dropdown menu is also visible, labeled '-- Select Primary Rate --'.

8- Select Subcategory from drop down list

The screenshot shows the 'Equipment' tab selected. The 'Member of' dropdown menu is open, displaying a list of subcategories. A red arrow points to the 'Power/Hydraulic Equipment (FLE)' option, which is highlighted in blue. The list of subcategories includes: 'Concrete/Asphalt Saws', 'Gas Pressure Washers', 'Grout Plant', 'Hilti Drills', 'Intrinsically Safe Light Stand 1000 w', 'Laser Level', 'Pneumatic Scrapers/Jackhammers', 'Power Screed', 'Power Trowels', 'Skid Steer Grapple Forks', 'Small Equipment (saws, drills, grinders etc.)', 'Water Pumps- 2", 3"', and 'Weed Wacker'. The 'Primary Rate' dropdown menu is also visible, labeled '-- Select Primary Rate --'.

Add Membership

9- Click on Add Membership

Adding Membership to equipment will allow the item to be show up in the list for the ratesheet

Equipment

Units: WP-10 ☐ Show Inactive

Name/Unit#: WP-10 ☐ Multi-Unit Make this unit an opti
Description: FLE Water Pumps-2 ☐ Efficiency Report
VIN/Serial Number: 20167542 ☐ Inactive

Member of Primary Rate

☐ Power/Hydraulic Equipment (FLE) - Water Pumps- 2", 3"

After clicking on Add Membership it will show that the equipment is a “Member of” as shown in image below;

Equipment

Units: WP-10 ☐ Show I

Name/Unit#: WP-10 ☐ Multi-Unit Make this un
Description: FLE Water Pumps-2 ☐ Efficiency Report
VIN/Serial Number: 20167542 ☐ Inactive

Member of Primary Rate

☐ Power/Hydraulic Equipment (FLE) - Water Pumps- 2", 3"

10- Click on the Primary Rate and select item from the drop down menu;

Calendar Customers Occupations Employees **Equipment** Ratesheets Timesheets Tickets Reports Files File G

Equipment

Units: WP-10 ☐ Show Inactive

Name/Unit#: WP-10 ☐ Multi-Unit Make this unit an option as a secondary unit on tickets
Description: FLE Water Pumps-2 ☐ Efficiency Report
VIN/Serial Number: 20167542 ☐ Inactive

Member of Primary Rate

☐ Power/Hydraulic Equipment (FLE) - Water Pumps- 2", 3"

11- After selecting, it will appear as follows;

Equipment

Units: WP-10 Add Update Delete ☐ Show Inactive

Name/Unit#: WP-10

Description: FLE Water Pumps-2

VIN/Serial Number: 20167542

☐ Multi-Unit Make this unit an option as a secondary unit on tickets
☐ Efficiency Report
☐ Inactive

Member of

☐ Power/Hydraulic Equipment (FLE) - Water Pumps- 2", 3"

Primary Rate
Power/Hydraulic Equipment (FLE) - Water Pumps- 2", 3"



12- Click on update

Equipment

Units: WP-10 Add Update Delete ☐ Show Inactive

Name/Unit#: WP-10

Description: FLE Water Pumps-2

VIN/Serial Number: 20167542

☐ Multi-Unit Make this unit an option as a secondary
☐ Efficiency Report
☐ Inactive



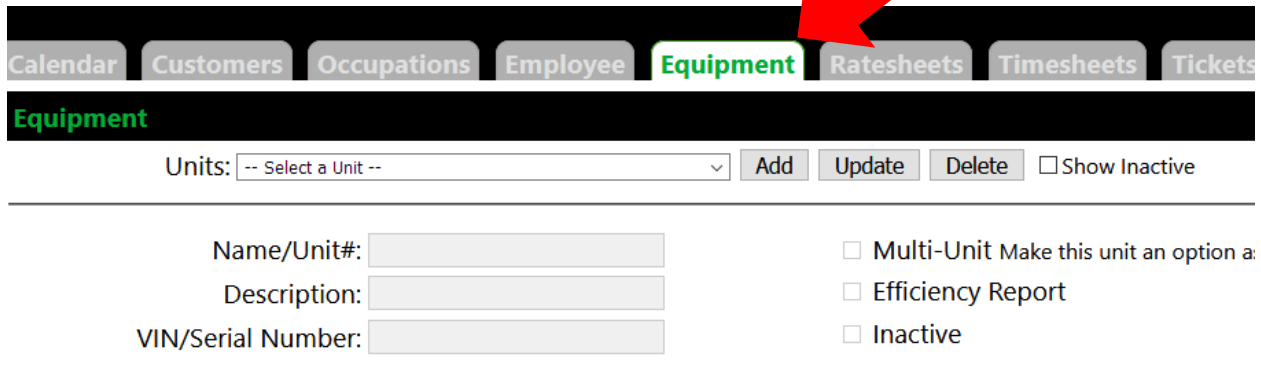
Congratulations you have successfully added the equipment.

If you do not see the subcategory you want to select, this specific subcategory needs to be added in the [Ratesheets](#) tab step by step instructions can be found here [“Ratesheets”](#)

Marking Equipment as Inactive

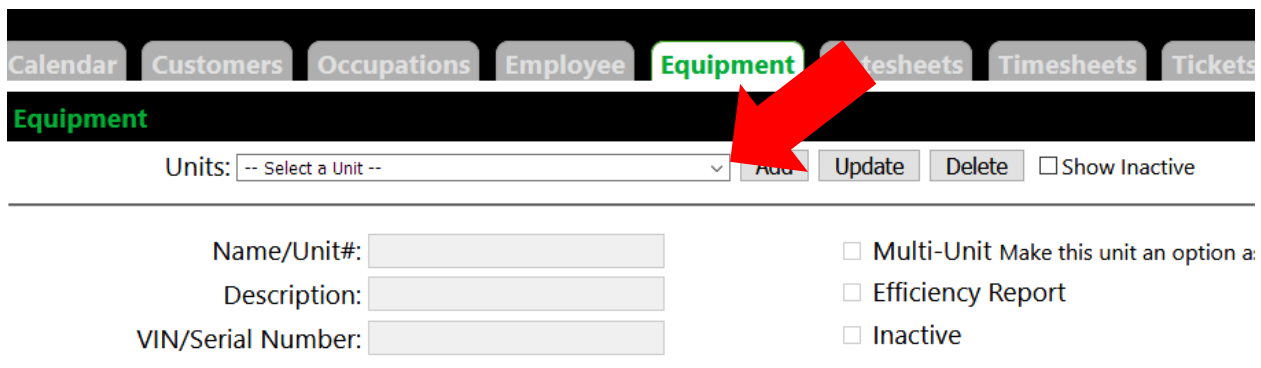
***Please note;** Marking a unit as “Inactive” will make the unit unable to be assigned on tickets and will hide it on the equipment reports

1- Click on Equipment Tab



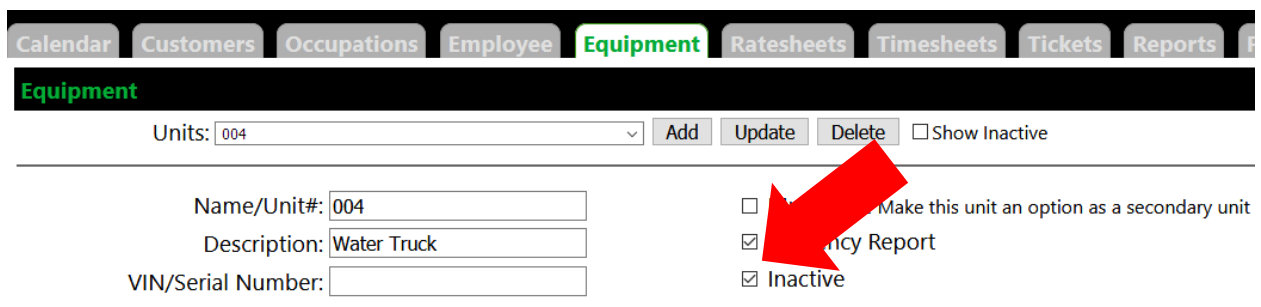
The screenshot shows the top navigation bar with tabs: Calendar, Customers, Occupations, Employee, **Equipment**, Ratesheets, Timesheets, and Tickets. Below the tabs, the 'Equipment' section is active. It features a dropdown menu for 'Units' with the text '-- Select a Unit --', and buttons for 'Add', 'Update', and 'Delete'. To the right of these buttons is a checkbox labeled 'Show Inactive'. Below this, there are three input fields: 'Name/Unit#:', 'Description:', and 'VIN/Serial Number:'. To the right of these fields are three checkboxes: 'Multi-Unit Make this unit an option a', 'Efficiency Report', and 'Inactive'.

2- Select Equipment from Drop Down Menu



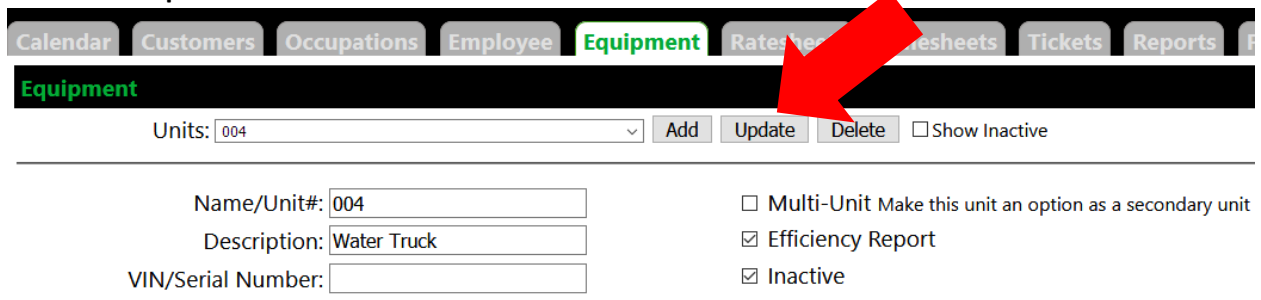
This screenshot is identical to the previous one, but a red arrow points to the 'Units' dropdown menu, which currently displays '-- Select a Unit --'.

3- Click on Inactive



The screenshot shows the 'Units' dropdown menu now populated with the value '004'. The 'Add', 'Update', and 'Delete' buttons are visible. The 'Show Inactive' checkbox is still present. The 'Name/Unit#:' field now contains '004', and the 'Description:' field contains 'Water Truck'. The 'VIN/Serial Number:' field is empty. The 'Inactive' checkbox is now checked, and a red arrow points to it.

4- Click on Update

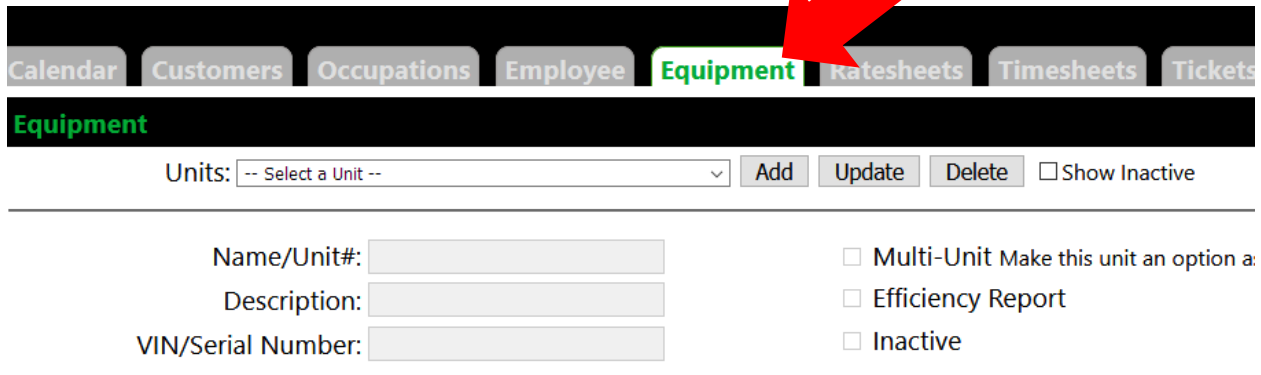


The screenshot shows the 'Update' button highlighted with a red arrow. The 'Units' dropdown menu still shows '004'. The 'Name/Unit#:' field contains '004', and the 'Description:' field contains 'Water Truck'. The 'VIN/Serial Number:' field is empty. The 'Inactive' checkbox remains checked.

The item is now inactive

To Mark Equipment as Active

1- Click on Equipment Tab



Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets

Equipment

Units: -- Select a Unit -- Add Update Delete ☐ Show Inactive

Name/Unit#:

Description:

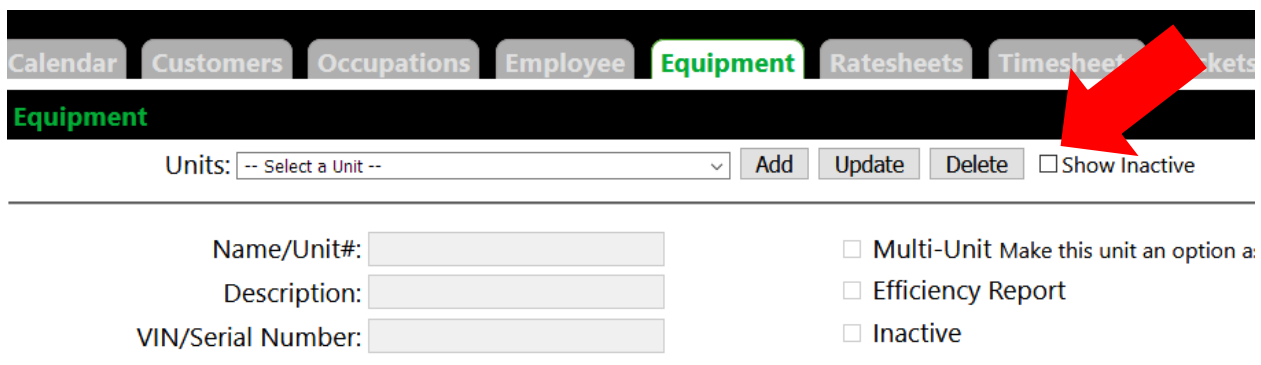
VIN/Serial Number:

☐ Multi-Unit Make this unit an option a

☐ Efficiency Report

☐ Inactive

2- Click on Show Inactive



Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets

Equipment

Units: -- Select a Unit -- Add Update Delete ☒ Show Inactive

Name/Unit#:

Description:

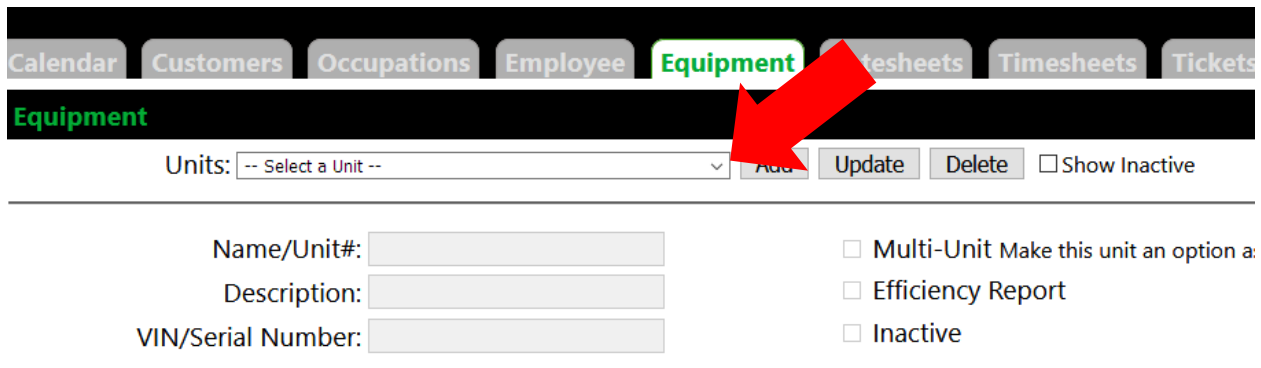
VIN/Serial Number:

☐ Multi-Unit Make this unit an option a

☐ Efficiency Report

☐ Inactive

3- Select Equipment you want to make Active from Drop Down Menu



Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets

Equipment

Units: -- Select a Unit -- Add Update Delete ☐ Show Inactive

Name/Unit#:

Description:

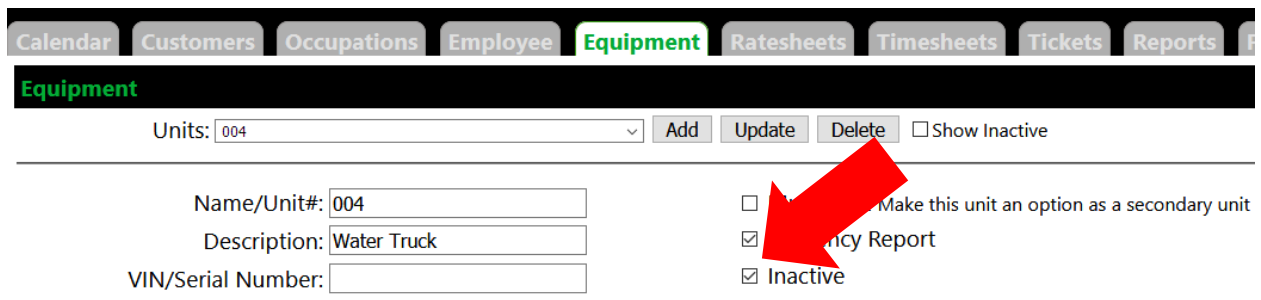
VIN/Serial Number:

☐ Multi-Unit Make this unit an option a

☐ Efficiency Report

☐ Inactive

4- Click on Inactive



Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets Reports P

Equipment

Units: 004 Add Update Delete ☐ Show Inactive

Name/Unit#: 004

Description: Water Truck

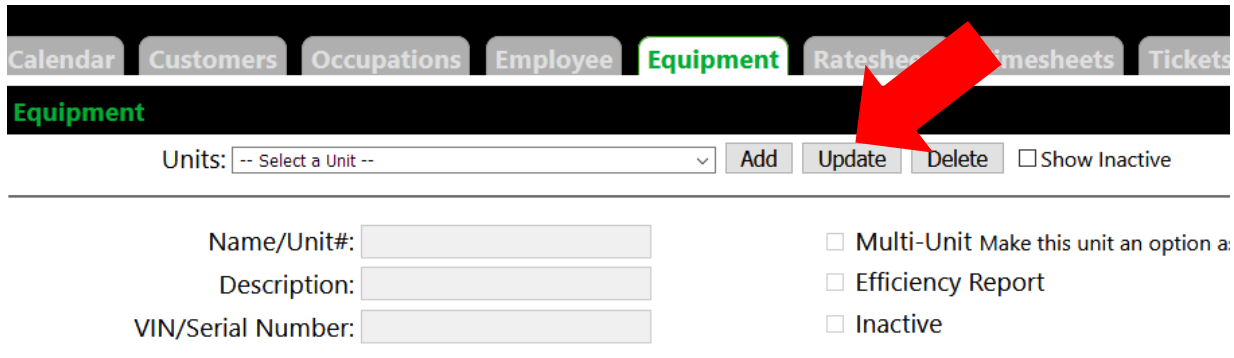
VIN/Serial Number:

☐ Multi-Unit Make this unit an option as a secondary unit

☒ Efficiency Report

☒ Inactive

5- Click on Update



Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets

Equipment

Units: -- Select a Unit -- Add Update Delete ☐ Show Inactive

Name/Unit#:

Description:

VIN/Serial Number:

☐ Multi-Unit Make this unit an option a

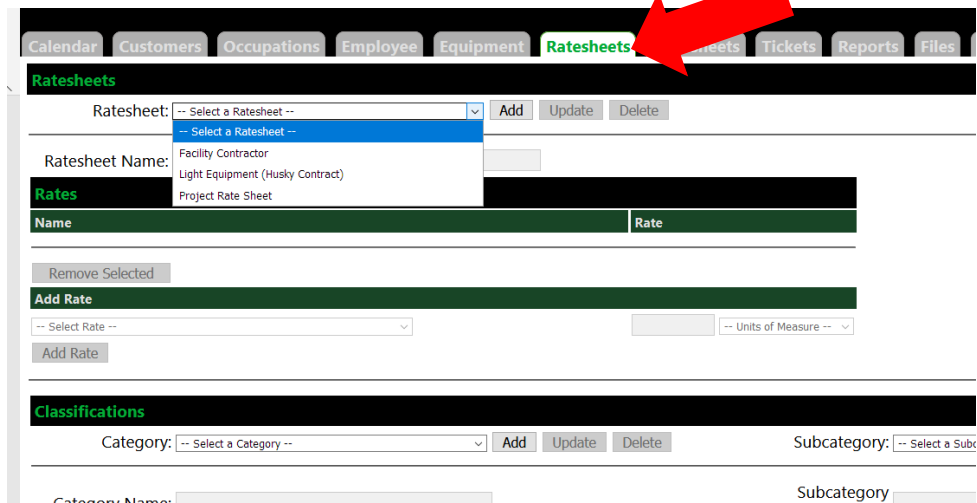
☐ Efficiency Report

☐ Inactive

Your equipment is now reactivated

Adding and viewing current Ratesheets and rates

1- Click on Ratesheets tab



Calendar Customers Occupations Employee Equipment **Ratesheets** Timesheets Tickets Reports Files

Ratesheets

Ratesheet: -- Select a Ratesheet -- Add Update Delete

Ratesheet Name: Facility Contractor
Light Equipment (Husky Contract)
Project Rate Sheet

Rates

Name	Rate
------	------

Remove Selected

Add Rate

-- Select Rate -- Units of Measure --

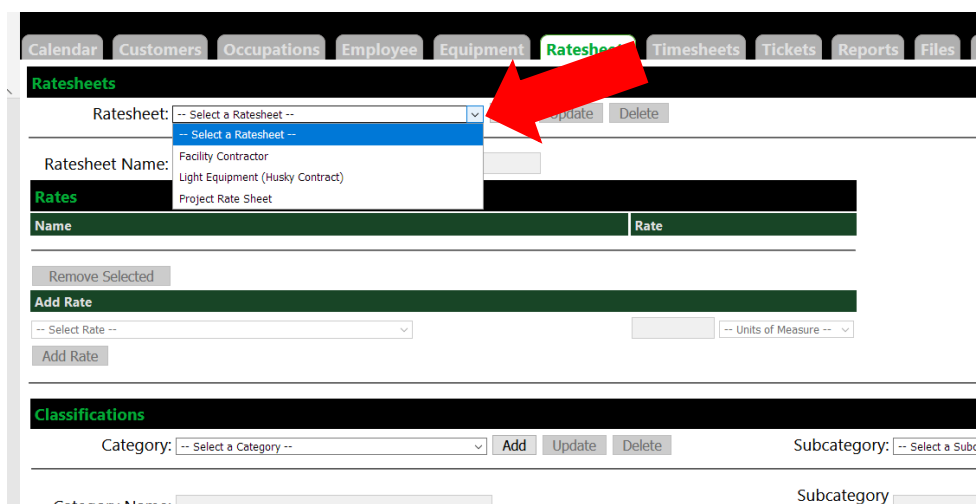
Add Rate

Classifications

Category: -- Select a Category -- Add Update Delete Subcategory: -- Select a Subcategory --

Category Name: Subcategory

2- To View current list of Rate Sheets click on the drop down arrow;



Calendar Customers Occupations Employee Equipment **Ratesheets** Timesheets Tickets Reports Files

Ratesheets

Ratesheet: -- Select a Ratesheet -- Add Update Delete

Ratesheet Name: Facility Contractor
Light Equipment (Husky Contract)
Project Rate Sheet

Rates

Name	Rate
------	------

Remove Selected

Add Rate

-- Select Rate -- Units of Measure --

Add Rate

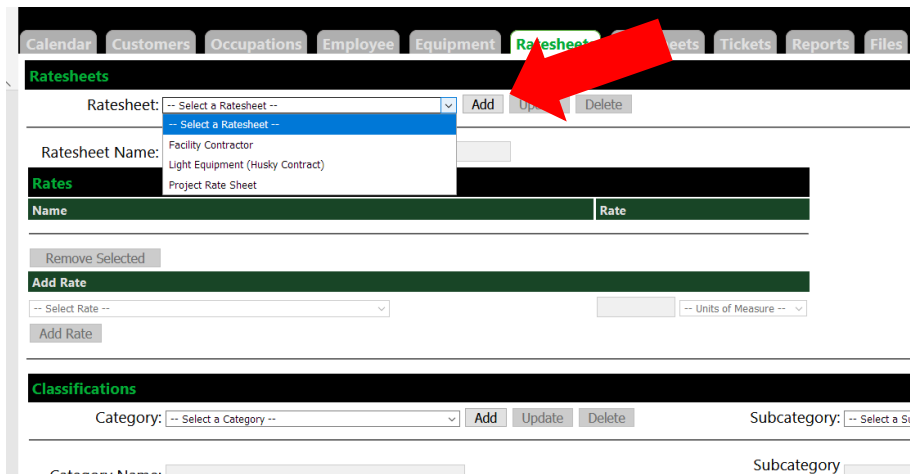
Classifications

Category: -- Select a Category -- Add Update Delete Subcategory: -- Select a Subcategory --

Category Name: Subcategory

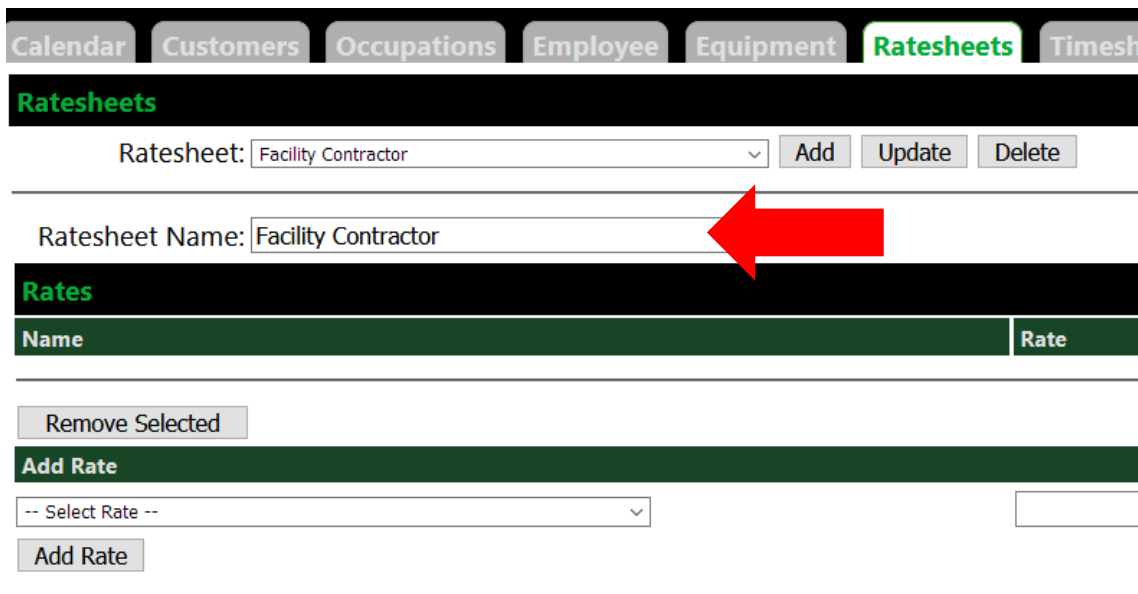
Add a new Ratesheet follow the following steps;

1. Click on add



The screenshot shows the 'Ratesheets' management interface. At the top, there is a navigation bar with tabs for Calendar, Customers, Occupations, Employee, Equipment, Ratesheets (highlighted), Tickets, Reports, and Files. Below the navigation bar, the 'Ratesheets' section is active. It features a dropdown menu for 'Ratesheet' with the option '-- Select a Ratesheet --'. To the right of the dropdown are buttons for 'Add', 'Update', and 'Delete'. A red arrow points to the 'Add' button. Below the dropdown, there is a 'Ratesheet Name' field with a list of suggestions: 'Facility Contractor', 'Light Equipment (Husky Contract)', and 'Project Rate Sheet'. Below this, there is a table with columns 'Name' and 'Rate'. Below the table, there is a 'Remove Selected' button. Below that, there is an 'Add Rate' button. Below the 'Add Rate' button, there is a dropdown menu for 'Select Rate' and a 'Units of Measure' dropdown. Below these, there is a 'Classifications' section with a 'Category' dropdown, 'Add', 'Update', and 'Delete' buttons, and a 'Subcategory' dropdown. Below the 'Classifications' section, there is a 'Category Name' field and a 'Subcategory' field.

2. Type in the name of the Ratesheet



The screenshot shows the 'Ratesheets' management interface. At the top, there is a navigation bar with tabs for Calendar, Customers, Occupations, Employee, Equipment, Ratesheets (highlighted), and Timesheet. Below the navigation bar, the 'Ratesheets' section is active. It features a dropdown menu for 'Ratesheet' with the option '-- Select a Ratesheet --'. To the right of the dropdown are buttons for 'Add', 'Update', and 'Delete'. Below the dropdown, there is a 'Ratesheet Name' field with the text 'Facility Contractor' entered. A red arrow points to the 'Ratesheet Name' field. Below the 'Ratesheet Name' field, there is a table with columns 'Name' and 'Rate'. Below the table, there is a 'Remove Selected' button. Below that, there is an 'Add Rate' button. Below the 'Add Rate' button, there is a dropdown menu for 'Select Rate' and a 'Units of Measure' dropdown. Below these, there is a 'Classifications' section with a 'Category' dropdown, 'Add', 'Update', and 'Delete' buttons, and a 'Subcategory' dropdown. Below the 'Classifications' section, there is a 'Category Name' field and a 'Subcategory' field.

3- Click on Save

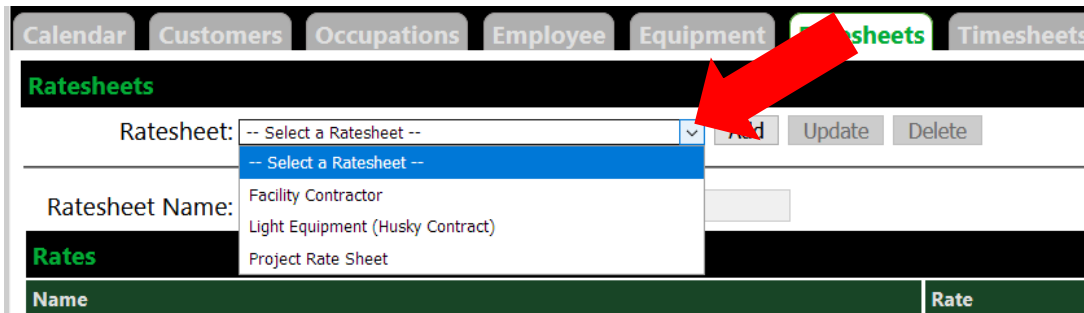


The screenshot shows the 'Ratesheets' management interface. At the top, there is a navigation bar with tabs for Calendar, Customers, Occupations, Employee, Equipment, Ratesheets (highlighted), and Timesheet. Below the navigation bar, the 'Ratesheets' section is active. It features a dropdown menu for 'Ratesheet' with the option '-- Select a Ratesheet --'. To the right of the dropdown are buttons for 'Add', 'Update', and 'Delete'. Below the dropdown, there is a 'Ratesheet Name' field with the text 'Facility Contractor' entered. A red arrow points to the 'Save' button. Below the 'Ratesheet Name' field, there is a table with columns 'Name' and 'Rate'. Below the table, there is a 'Remove Selected' button. Below that, there is an 'Add Rate' button. Below the 'Add Rate' button, there is a dropdown menu for 'Select Rate' and a 'Units of Measure' dropdown. Below these, there is a 'Classifications' section with a 'Category' dropdown, 'Add', 'Update', and 'Delete' buttons, and a 'Subcategory' dropdown. Below the 'Classifications' section, there is a 'Category Name' field and a 'Subcategory' field.

Your new Ratesheet page has been created, the next section we will review step by step on how to add Rates.

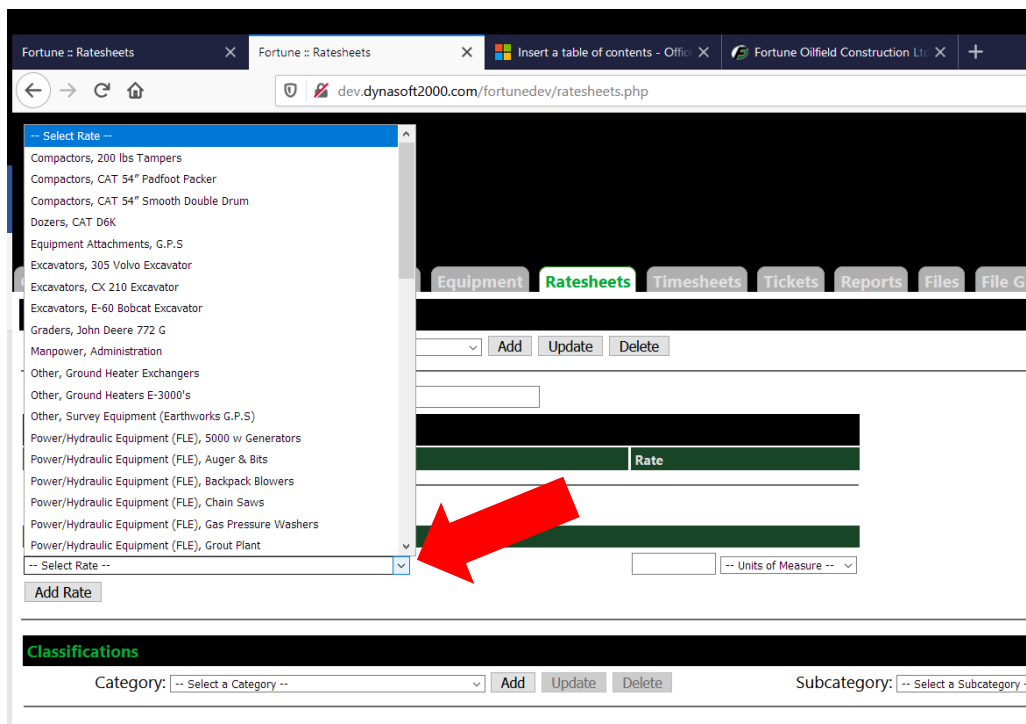
Adding Rates

1- Select Rate Sheet from Drop Down List



The screenshot shows the 'Ratesheets' form. At the top, there are tabs for 'Calendar', 'Customers', 'Occupations', 'Employee', 'Equipment', 'Ratesheets' (active), and 'Timesheets'. Below the tabs, the 'Ratesheet:' dropdown menu is open, showing options: '-- Select a Ratesheet --', 'Facility Contractor', 'Light Equipment (Husky Contract)', and 'Project Rate Sheet'. A red arrow points to the dropdown menu. To the right of the dropdown are 'Add', 'Update', and 'Delete' buttons. Below the dropdown is the 'Ratesheet Name:' field. At the bottom, there is a table with columns 'Name' and 'Rate'.

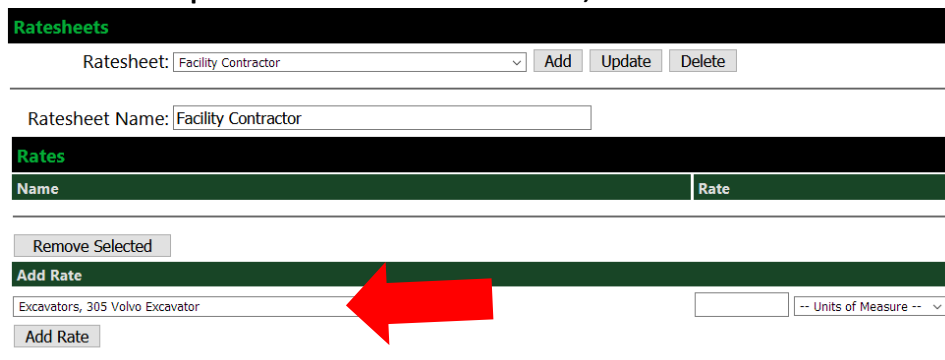
2- Select Rate from drop down menu



The screenshot shows the 'Ratesheets' form with the 'Add Rate' dropdown menu open. The dropdown menu lists various equipment types, including 'Compactors, 200 lbs Tampers', 'Compactors, CAT 54" Padfoot Packer', 'Compactors, CAT 54" Smooth Double Drum', 'Dozers, CAT D6K', 'Equipment Attachments, G.P.S', 'Excavators, 305 Volvo Excavator', 'Excavators, CX 210 Excavator', 'Excavators, E-60 Bobcat Excavator', 'Graders, John Deere 772 G', 'Manpower, Administration', 'Other, Ground Heater Exchangers', 'Other, Ground Heaters E-3000's', 'Other, Survey Equipment (Earthworks G.P.S)', 'Power/Hydraulic Equipment (FLE), 5000 w Generators', 'Power/Hydraulic Equipment (FLE), Auger & Bits', 'Power/Hydraulic Equipment (FLE), Backpack Blowers', 'Power/Hydraulic Equipment (FLE), Chain Saws', 'Power/Hydraulic Equipment (FLE), Gas Pressure Washers', and 'Power/Hydraulic Equipment (FLE), Grout Plant'. A red arrow points to the dropdown menu. Below the dropdown is the 'Add Rate' button. To the right of the dropdown is the 'Units of Measure' dropdown menu. Below the dropdown is the 'Classifications' section with 'Category' and 'Subcategory' dropdown menus and 'Add', 'Update', and 'Delete' buttons.

3- Select the item you would like to add

In this example we will select the Excavators, 305 Volvo Excavator



The screenshot shows the 'Ratesheets' form. The 'Ratesheet:' dropdown menu is set to 'Facility Contractor'. The 'Ratesheet Name:' field is 'Facility Contractor'. Below the form, there is a table with columns 'Name' and 'Rate'. Below the table, there is a 'Remove Selected' button. Below the button, there is an 'Add Rate' button. Below the button, the 'Add Rate' dropdown menu is open, showing the option 'Excavators, 305 Volvo Excavator'. A red arrow points to the dropdown menu. To the right of the dropdown is the 'Units of Measure' dropdown menu. Below the dropdown is the 'Add Rate' button.

4- Enter in the amount of the rate being charged as shown in Example;

Ratesheets

Ratesheet: Facility Contractor

Ratesheet Name: Facility Contractor

Rates

Name	Rate
------	------

Add Rate

Excavators, 305 Volvo Excavator

15

5- Select the unit of measure from the drop down menu (month, day, hour, km or %)

Ratesheet: Facility Contractor

Ratesheet Name: Facility Contractor

Rates

Name	Rate
------	------

Add Rate

Excavators, 305 Volvo Excavator

15

Classifications

Category: -- Select a Category --

Category Name:

Subcategory:

After the Unit of Measure has been selected it will appear as follows;

Ratesheets

Ratesheet: Facility Contractor

Ratesheet Name: Facility Contractor

Rates

Name	Rate
------	------

Add Rate

Excavators, 305 Volvo Excavator

15 month

6- Click on Add Rate

Ratesheets

Ratesheet: Facility Contractor Add Update Delete

Ratesheet Name: Facility Contractor

Rates

Name	Rate
------	------

Remove Selected

Add Rate

Excavators, 305 Volvo Excavator 15 month

Add Rate

The items you have added will now appear under rates;

Ratesheets

Ratesheet: Facility Contractor Add Update Delete

Ratesheet Name: Facility Contractor

Rates

<input type="checkbox"/> Vehicles, ATVs	\$16 /hour
<input type="checkbox"/> Vehicles, Crew Truck	\$29.5 /hour
<input type="checkbox"/> Vehicles, Water Trucks	\$209 /day

7- Click on Update to save the entries

Ratesheets

Ratesheet: Facility Contractor Add Update Delete

Ratesheet Name: Facility Contractor

Rates

Name	Rate
<input type="checkbox"/> Vehicles, ATVs	\$16 /hour
<input type="checkbox"/> Vehicles, Crew Truck	\$29.5 /hour
<input type="checkbox"/> Vehicles, Water Trucks	\$209 /day

Congratulations you have successfully added rates

Duplicate Entry in Rate Sheets

Entered in the wrong information? or duplicate entry? Follow these steps to correct the entries;

- 1- Review the list of entries
- 2- Find the equipment you would like to remove
- 3- In the example below the PHE (FHE) Loader Pallet for \$20/day needs to be removed

<input type="checkbox"/> Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple	\$20 /day
<input type="checkbox"/> Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple	\$45 /hour

- 4- Put a check mark in the box beside the equipment you want to remove;

<input checked="" type="checkbox"/> Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple	\$20 /day
<input type="checkbox"/> Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple	\$45 /hour

- 5- Click on Remove Selected;

<input checked="" type="checkbox"/> Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple	\$20 /day
<input type="checkbox"/> Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple	\$45 /hour

Remove Selected

- 6- Click on Update

Ratesheets

Ratesheet: Facility Contractor

Add

Update

Delete

Ratesheet Name: Facility Contractor

Rates

Name	Rate
<input type="checkbox"/> Vehicles, ATVs	\$16 /hour
<input type="checkbox"/> Vehicles, Crew Truck	\$29.5 /hour
<input type="checkbox"/> Vehicles, Water Trucks	\$209 /day

Congratulations you have successfully removed the rate entered incorrectly or duplicate entry

Add Category

In this section we will add a main category which will allow you to enter in codes

- 1- Click on Ratesheet after logging into your application
- 2- Scroll to the section where it reads Classifications
- 3- Click on Add

Classifications

Category: -- Select a Category -- 

Add Update Delete


Category Name:

☐ Inactive

- 4- Type in the name of the Category

Classifications


Category: -- Select a Category -- Add Save Cancel

Category Name: 

☐ Inactive

- 5- Click on Save

Classifications

Category: -- Select a Category -- Add  Save Cancel

Category Name:

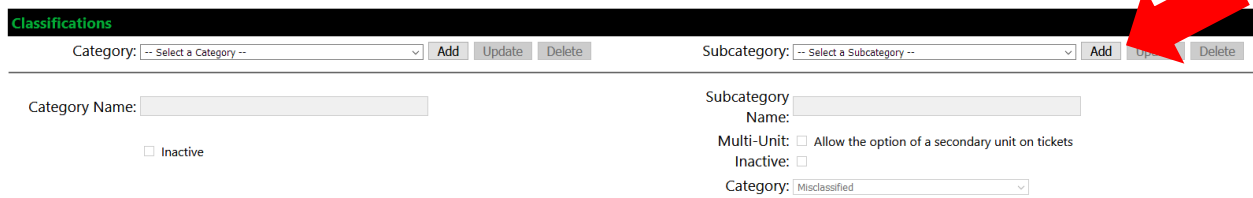
☐ Inactive

You have successfully added a new Category

Adding a SubCategory

This section will add the subcategory for your parts

1- Click on Add



Classifications

Category: -- Select a Category -- Add Update Delete Subcategory: -- Select a Subcategory -- Add Update Delete

Category Name:

☐ Inactive

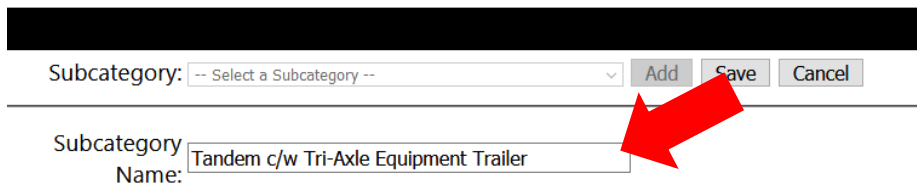
Subcategory Name:

Multi-Unit: ☐ Allow the option of a secondary unit on tickets

Inactive: ☐

Category: Misclassified

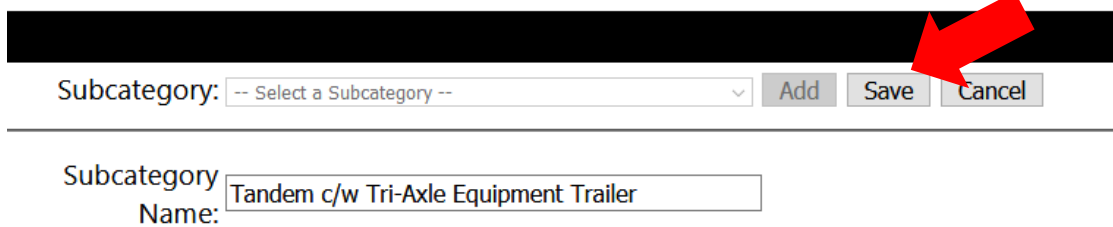
2- Type in the Subcategory name



Subcategory: -- Select a Subcategory -- Add Save Cancel

Subcategory Name:

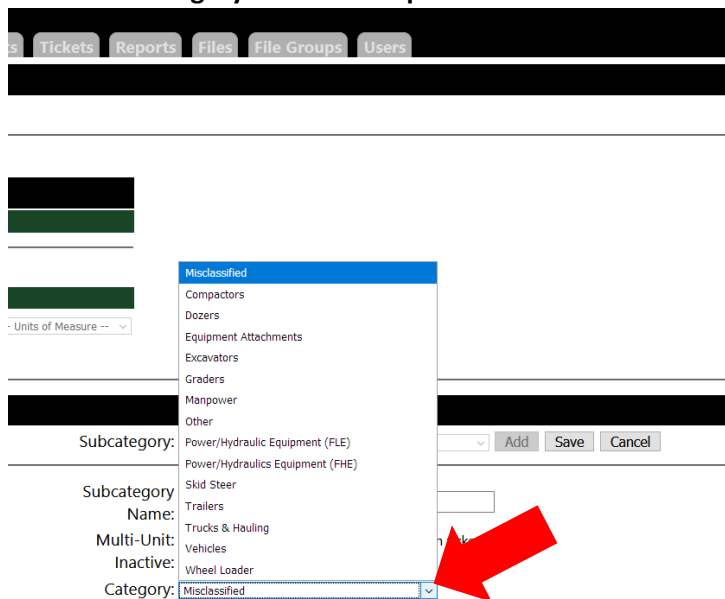
3- Click on Save



Subcategory: -- Select a Subcategory -- Add Save Cancel

Subcategory Name:

4- Select the Category from the dropdown list



s Tickets Reports Files File Groups Users

Subcategory:

Subcategory Name:

Multi-Unit: ☐ Allow the option of a secondary unit on tickets

Inactive: ☐

Category:

Units of Measure: --

Misclassified

Compactors

Dozers

Equipment Attachments

Excavators

Graders

Manpower

Other

Power/Hydraulic Equipment (FLE)

Power/Hydraulics Equipment (FHE)

Skid Steer

Trailers

Trucks & Hauling

Vehicles

Wheel Loader


For this example, we selected Trucks & Hauling click on the category item you wish to select
After selecting this category, it will appear as per example below;

Subcategory: -- Select a Subcategory --


Subcategory Name: Tandem c/w Tri-Axle Equipment Trailer

Multi-Unit: ☐ Allow the option of a secondary unit on tickets

Inactive: ☐

Category: Trucks & Hauling 

5- Click on Save button

Subcategory: -- Select a Subcategory -- 

Subcategory Name: Tandem c/w Tri-Axle Equipment Trailer

Multi-Unit: ☐ Allow the option of a secondary unit on tickets

Inactive: ☐

Category: Trucks & Hauling

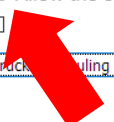
If the subcategory has a Multi-Unit that needs to be attached please ensure you put a check mark in the Multi-Unit box

Subcategory: -- Select a Subcategory --


Subcategory Name: Tandem c/w Tri-Axle Equipment Trailer

Multi-Unit: ☐ Allow the option of a secondary unit on tickets

Inactive: ☐

Category: Trucks & Hauling 

After Checking the Multi-Unit box please ensure to click on update

Subcategory: Crew Truck 

Subcategory Name: Crew Truck

Multi-Unit: ☒ Allow the option of a secondary unit on tickets

Inactive: ☐

Category: Vehicles

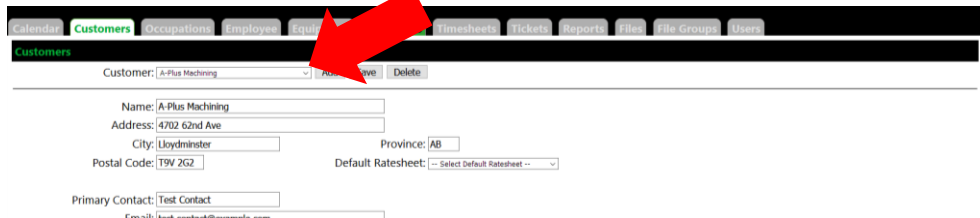
You have successfully added a SubCategory

Applying Default Ratesheet to Customer

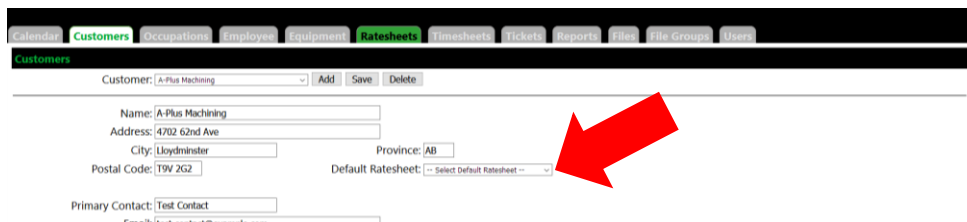
1- Click on the Customers Tab



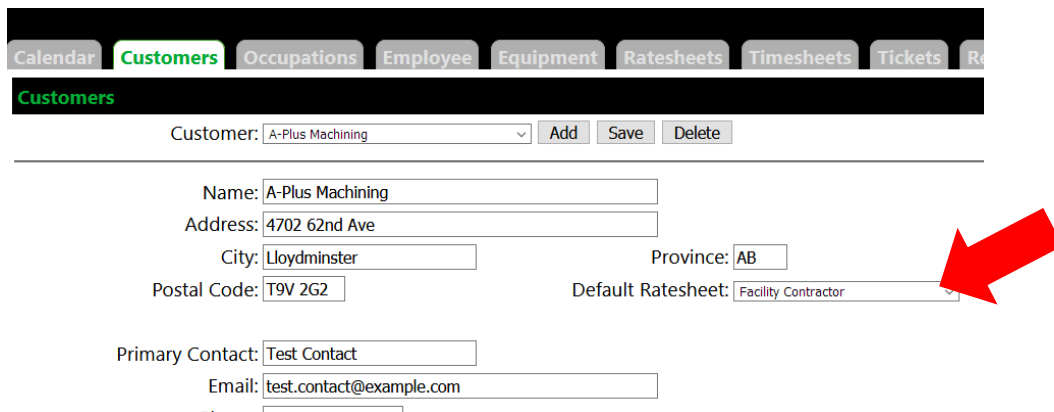
2- Select Customer from Drop Down Menu



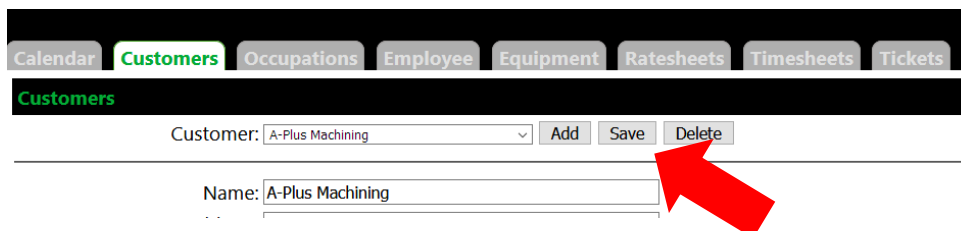
3- Click on the drop down Menu for Default Ratesheet



4- Select the rate sheet from drop down menu



5- Click on save



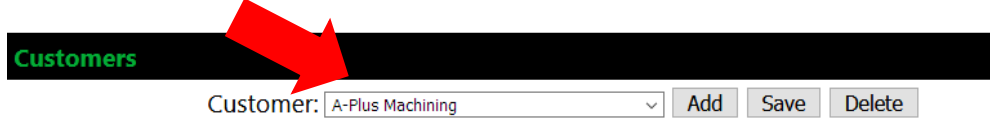
Adding default Ratesheet to Customer successfully completed

Applying Ratesheets to specific projects

1- Select Customers Tab



2- Select Customer from drop down menu



3- Once you have selected the Customer scroll down the page and possibly to the right depending on your monitor until you see Ratesheet

Project #	Name	Location	Manager	Fortune PM	Description	Proposal #	Status	Start Date (Y-M-D)	End Date	Ratesheet
<input type="checkbox"/> 19-01	new project	Lyodminster	Client Manager	Elgie, Dennis		2019-18	Completed	2019-01-01	2019-01-05	Default
<input type="checkbox"/> 19-03	really long name really long name			Taylor, Leah		2019-17	Active	2019-01-06	2019-01-08	Default

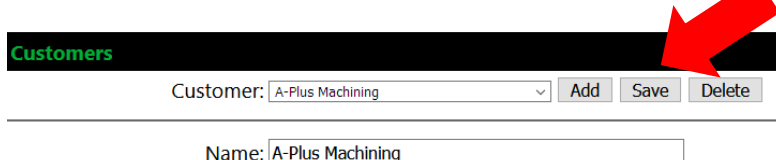
4- Click on the drop down menu under the title "Ratesheet"

Project #	End Date	Ratesheet	Archived
-01	2019-01-05	Default	<input type="checkbox"/>
-06	2019-01-08	Default	<input type="checkbox"/>
-15	2019-01-16	Facility Contractor	<input type="checkbox"/>
-27	2019-01-31	Light Equipment (Husky Contract)	<input type="checkbox"/>
-03	2019-12-31	Project Rate Sheet	<input type="checkbox"/>
		Default	<input type="checkbox"/>

5- Select the Ratesheet preference for this project

End Date	Ratesheet	Archived
2019-01-05	Facility Contractor	<input type="checkbox"/>
2019-01-08	Default	<input type="checkbox"/>

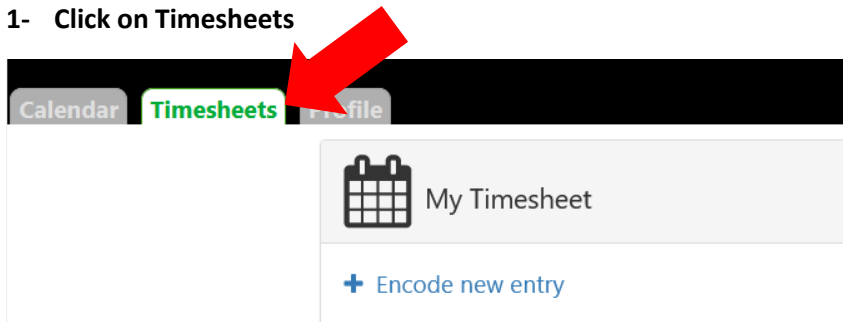
6- Click Save



You have successfully added a Ratesheet to the Project

Add Timesheets as Employee

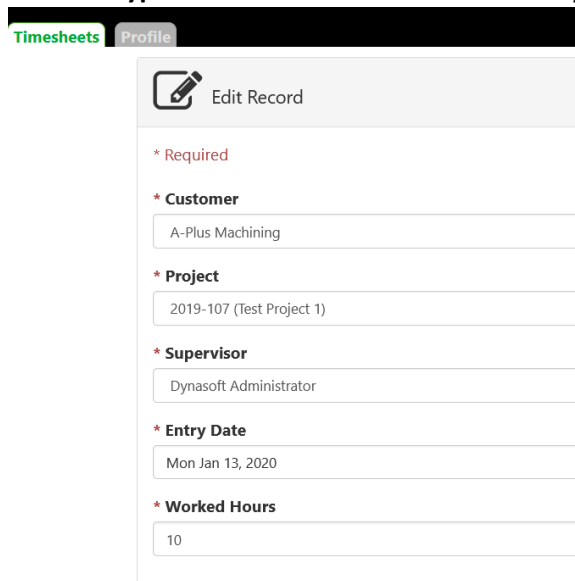
1- Click on Timesheets




2- Click on Encode new entry

3- Fill out your information for each field by selecting the appropriate drop-down selections for

- Customer
- Project
- Supervisor
- Select the appropriate Entry Date
- Type in the numeric amount of hours you worked



Timesheets Profile

 Edit Record

* Required

* Customer
A-Plus Machining

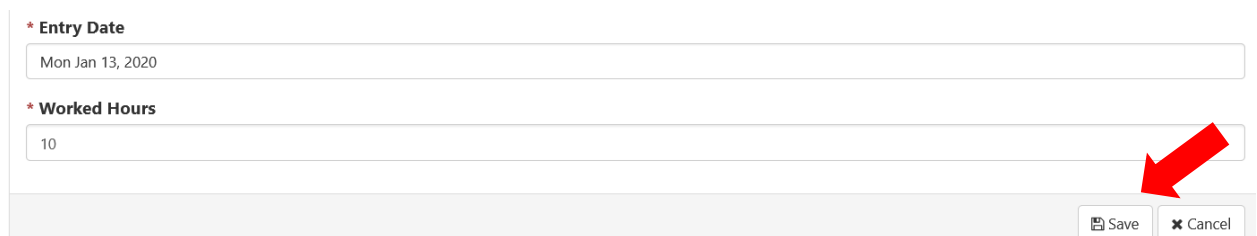
* Project
2019-107 (Test Project 1)

* Supervisor
Dynasoft Administrator

* Entry Date
Mon Jan 13, 2020



* Worked Hours
10

4- Click on Save



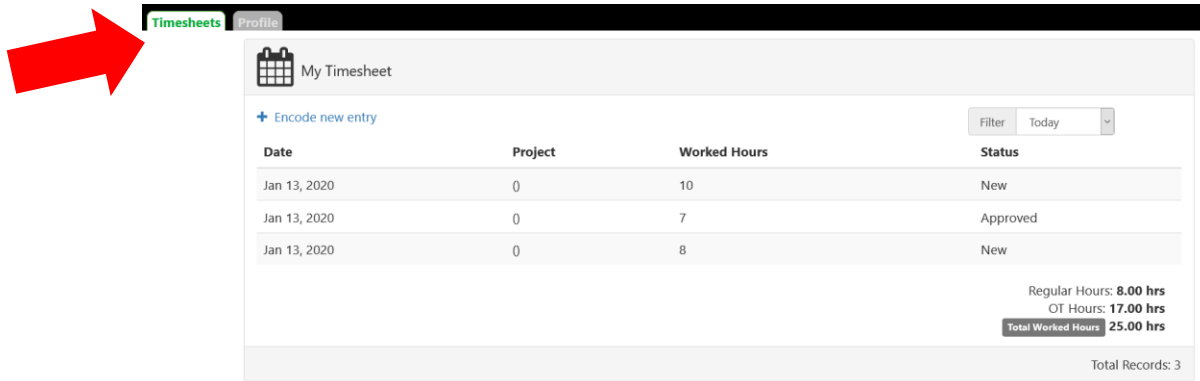
* Entry Date
Mon Jan 13, 2020

* Worked Hours
10

Edit Timesheets as Employee

1- Click on Timesheets Tab



The screenshot shows the 'My Timesheet' interface. At the top, there are two tabs: 'Timesheets' (highlighted in green) and 'Profile'. Below the tabs, there is a header 'My Timesheet' with a calendar icon. A link '+ Encode new entry' is on the left, and a 'Filter' dropdown set to 'Today' is on the right. A table lists three entries for 'Jan 13, 2020' with 'Project' 0 and 'Worked Hours' 10, 7, and 8 respectively. The statuses are 'New', 'Approved', and 'New'. At the bottom right, a summary shows 'Regular Hours: 8.00 hrs', 'OT Hours: 17.00 hrs', and 'Total Worked Hours: 25.00 hrs'. The total records are 3.

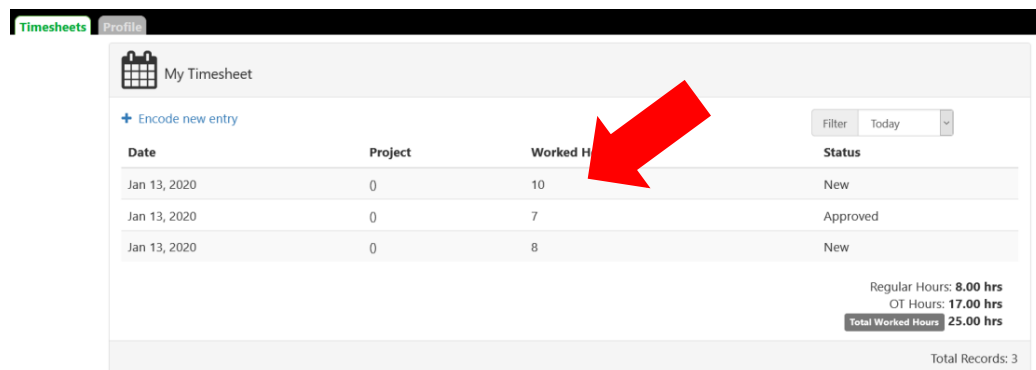
Date	Project	Worked Hours	Status
Jan 13, 2020	0	10	New
Jan 13, 2020	0	7	Approved
Jan 13, 2020	0	8	New

Regular Hours: 8.00 hrs
OT Hours: 17.00 hrs
Total Worked Hours: 25.00 hrs
Total Records: 3

2- Click on the Timesheet you would like to edit

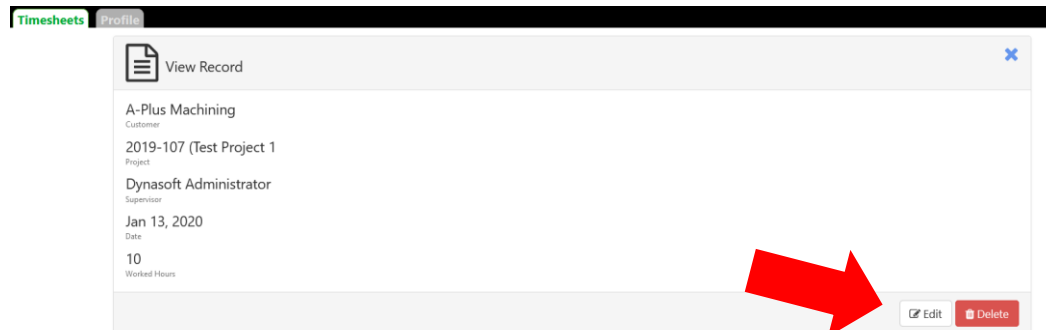
In this example we want to edit the hours worked for the top entry

Click on the January 13th, 2020 line with 10 hours worked



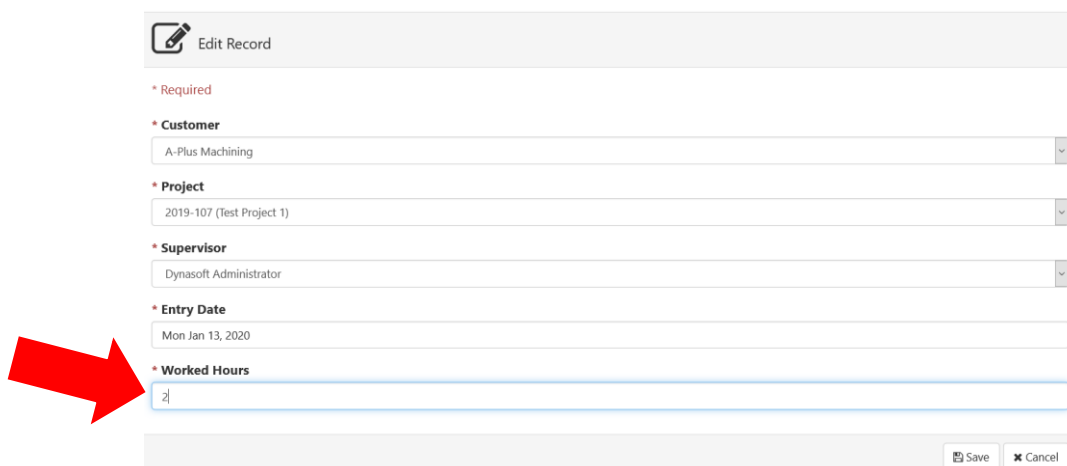
This screenshot is identical to the previous one, but with a red arrow pointing to the first entry in the table (Jan 13, 2020, Project 0, Worked Hours 10, Status New).

3- Click on edit



The screenshot shows a 'View Record' dialog box. It contains the following information: Customer: A-Plus Machining, Project: 2019-107 (Test Project 1), Supervisor: Dynasoft Administrator, Date: Jan 13, 2020, and Worked Hours: 10. At the bottom right, there are two buttons: 'Edit' (with a pencil icon) and 'Delete' (with a trash icon). A red arrow points to the 'Edit' button.

4- Edit the information needed



The screenshot shows the 'Edit Record' form. It has several fields with dropdown menus: Customer (A-Plus Machining), Project (2019-107 (Test Project 1)), Supervisor (Dynasoft Administrator), and Entry Date (Mon Jan 13, 2020). The 'Worked Hours' field is a text input box containing the number '10'. A red arrow points to this field. At the bottom right, there are 'Save' and 'Cancel' buttons.

* Required

* Customer
A-Plus Machining

* Project
2019-107 (Test Project 1)

* Supervisor
Dynasoft Administrator

* Entry Date
Mon Jan 13, 2020

* Worked Hours
10

Save Cancel

5- Click on Save

 Edit Record

*** Required**

*** Customer**

A-Plus Machining

*** Project**

2019-107 (Test Project 1)

*** Supervisor**


Dynasoft Administrator

*** Entry Date**

Mon Jan 13, 2020


*** Worked Hours**

2


Save Cancel

Delete Timesheets as Employee

1- Click on Timesheets Tab



Timesheets Profile

 My Timesheet

[+ Encode new entry](#) Filter Today


Date	Project	Worked Hours	Status
Jan 13, 2020	0	10	New
Jan 13, 2020	0	7	Approved
Jan 13, 2020	0	8	New

Regular Hours: 8.00 hrs
OT Hours: 17.00 hrs
Total Worked Hours: 25.00 hrs

Total Records: 3

2- Click on the Timesheet you would like to edit

Timesheets Profile


 My Timesheet

[+ Encode new entry](#) Filter Today

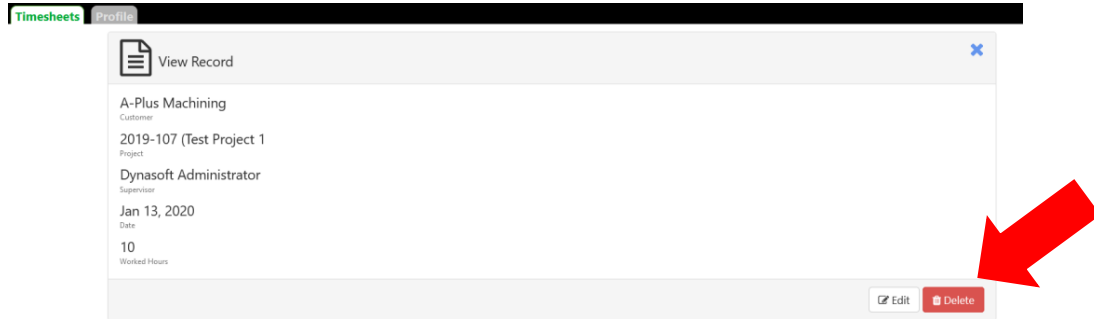
Date	Project	Worked Hours	Status
Jan 13, 2020	0	10	New
Jan 13, 2020	0	7	Approved
Jan 13, 2020	0	8	New

Regular Hours: 8.00 hrs
OT Hours: 17.00 hrs
Total Worked Hours: 25.00 hrs

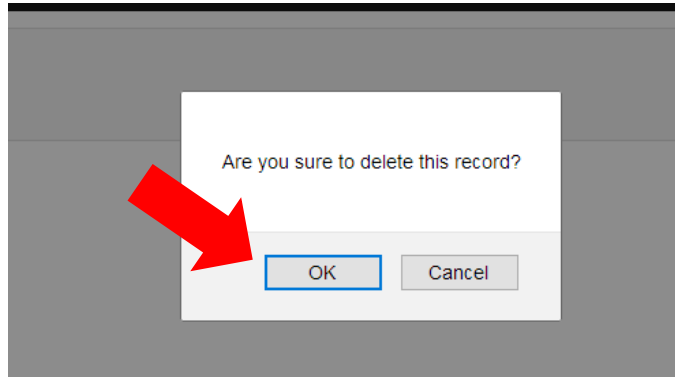
Total Records: 3



3- Click on Delete

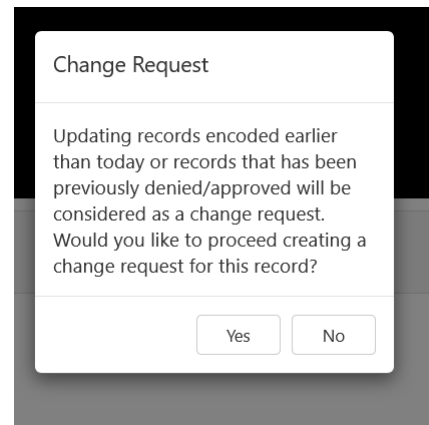
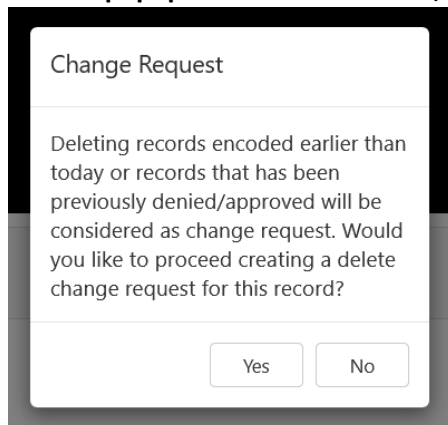


4- A popup will occur asking “Are you sure to delete this record?”



If you are sure click on OK

If the Timesheet has been approved and you are editing or trying to delete the entry you made a popup will show as follows;

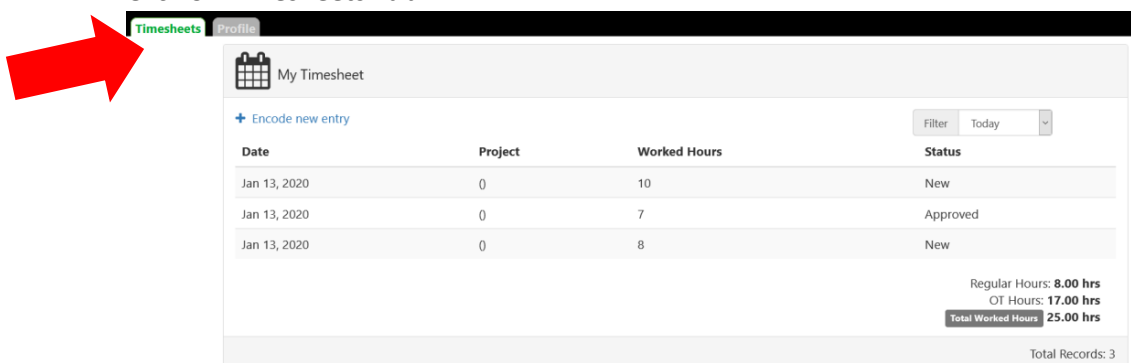


Click on Yes or No as required

If a timesheet has been entered for a date in the past a change request will be submitted to Admin.

Reviewing Timesheets as Administrator

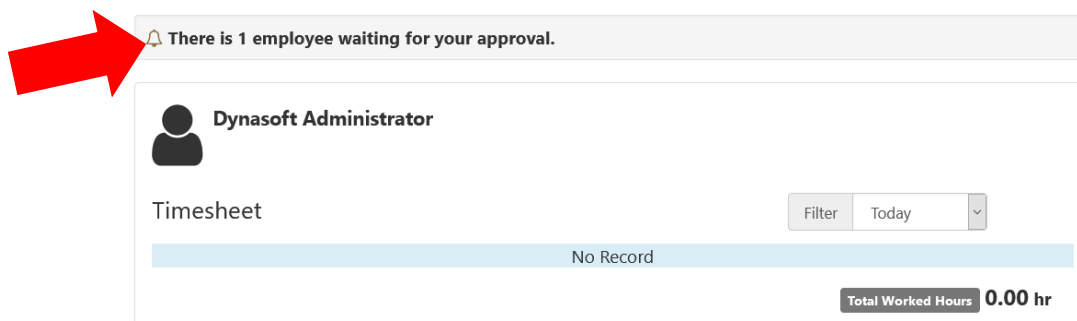
- 1- Login as Administrator
- 2- Click on Timesheets Tab



Date	Project	Worked Hours	Status
Jan 13, 2020	0	10	New
Jan 13, 2020	0	7	Approved
Jan 13, 2020	0	8	New

Regular Hours: 8.00 hrs
OT Hours: 17.00 hrs
Total Worked Hours: 25.00 hrs
Total Records: 3

- 3- If Employees have timesheets entered you will see “There is 1 employee waiting for your approval”
 - a. Click on “There is 1 employee waiting for your approval”



There is 1 employee waiting for your approval.

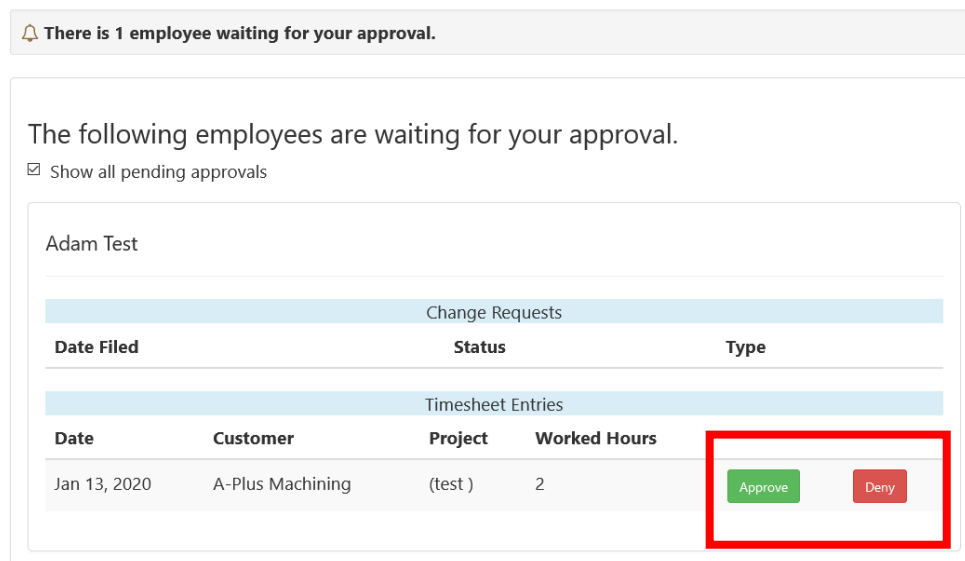
Dynasoft Administrator

Timesheet

No Record

Total Worked Hours 0.00 hr

- 4- You will be able to review the hours and Approve or Deny the entry



There is 1 employee waiting for your approval.

The following employees are waiting for your approval.

☒ Show all pending approvals

Adam Test

Change Requests			
Date Filed	Status	Type	
Timesheet Entries			
Date	Customer	Project	Worked Hours
Jan 13, 2020	A-Plus Machining	(test)	2

Approve Deny

If an employee has edited or tried to delete an entry after it has been approved you will also receive the “There is 1 employee waiting for your approval”

If a Employee has entered their timesheet for a date in the past a change request will be submitted to Admin.

Add Tickets

- 1- Click on Tickets Tab

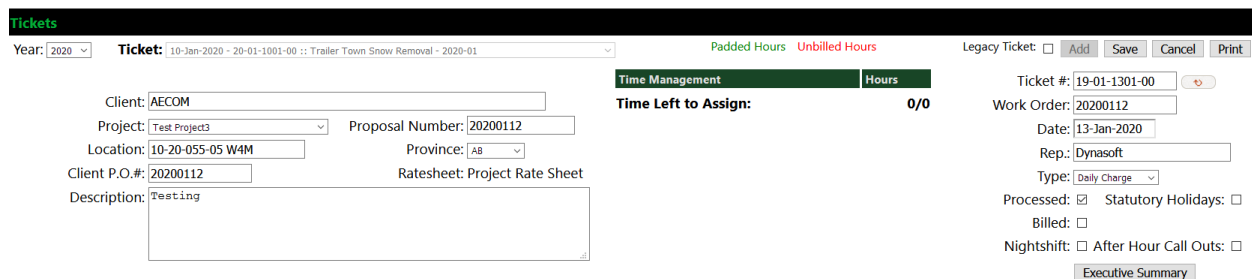


- 2- Click on Add

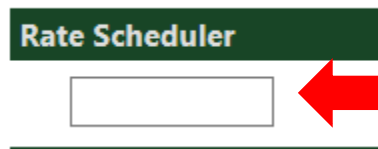


- 3- Start Typing Clients name and select Client from list
- 4- Select Project from dropdown list
- 5- Enter in Proposal Number if one has been provided
- 6- Enter in Client PO# if one has been provided
- 7- Select Date
- 8- Enter in Rep if required
- 9- Select Type from Drop Down Menu
- 10- How the ticket will be processed

Once the above fields have been filled out your screen should appear similar to below

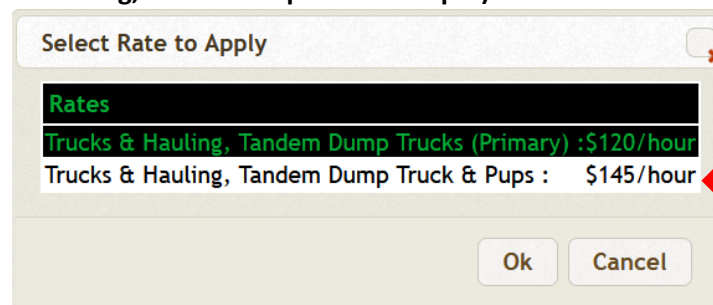


- 11- Click on Save
- 12- Under the Rate Scheduler enter in Unit # for this example we will use 511 and Truck Pups
 - a. Click on empty box under "Rate Scheduler"



Enter in the Unit Number – For this example it was 511

- b. Hit the Enter Key on your keyboard
- c. Popup will occur select the option required (for this example we will select the "Trucks & Hauling, Tandem Dup Truck & Pups")



- d. Once you have the selection highlighted you would like to utilize click on ok

- e. A second box will appear to the right (this is where you add “additional equipment” mainly trailers, pups, enddumps)

- f. Type in Additional Equipment number (For this example we used T200)

- g. Select Employee from Drop Down list
h. Select Occupation from Drop Down list
i. The QTY and Rate Box will now be editable
j. Enter in the QTY
k. Select the Drop Down list for Rate /none, /month, /day, /hour, /km, /% and select the best option for this entry (for this example we left it at /hour)

Rate Scheduler	Employee	Occupation	Qty	Rate	Total
<input type="checkbox"/> Trucks & Hauling, Tandem Dump Truck & Pups:511 T200	Administrator, Dynasoft	Administration	1	145.00 / hour	145.00
<input type="text"/>	-- Select an Employee --	-- Select an Occupation --	0	0.00 -- Rate --	145.00

- l. Under the Cost Plus Rates (in this example we show box filled out)
Dynasoft went to purchase 5x Plywood from nelsons at the cost of \$150 per sheet.
Dynasoft called R&D Plumbing and Fortune were charged \$1500 for 1 hour

- i. Select from Drop Down menu (Materials & Rental Equipment, or Subcontractor Labor)
ii. Under the Description entry (start typing Plywood, a list of options will appear and select the best one by click on the entry)
iii. Click Tab on your keyboard to get to next section QTY, enter the QTY required
iv. Click Tab on your keyboard to get to next section Rate Change the Rate if needed
v. Use your mouse to click on the drop down list if needing to change it from /Hour to one of the other options.

Cost Plus Rates	Description	Qty	Rate	Markup	Total
<input type="checkbox"/> Materials & Rental Equipment	Plywood (nelsons) P	5	150.00	15.00 / %	862.50
<input type="checkbox"/> Subcontractor Labor	R&D Plumbing and Heating Invoice#39398	1	1500.00	10.00 / %	1650.00
-- Select Rate --		0	0.00	0.00 / %	2512.50

- vi. Click on Update