

Setting Up Time Management

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To prepare your system for handling team members' timesheets, your system administrator should:

- Configure the line item codes (LICs) for labor
- Set up the related system preferences
- Configure the Team Member records
- Activate the related automation schedule

Time Line Item Codes

aACE tracks time using [line item codes](#) that team members use to record hours. Your system administrator should create LICs for each labor category. Time-type LICs have a few important features that are different from other LIC types:

The screenshot displays the configuration for a Line Item Code (LIC) named "L-SALES Sales". The interface includes a header with "Record: 1 of 8" and a toolbar with "New", "Edit", "Delete", "Print", and "Actions". The "Line Item Code: L-SALES Sales" is shown as "ACTIVE".

General Info: The "PTO" and "Non-Billable Time" flags are circled in green. The "Type" is "Time", "Rate Type" is "Fixed Price", "Rate Value" is "0.00", and "VDS" is "0.00". The "Est Unit Cost" is "50.00", "Price" is "0.00", "Comm Type" is "Not Applicable", and "Comm Value" is "0.00".

Accounting Setup: "Revenue Account" is "4001 Uncategorized Sales" and "Cost Account" is "5001 Cost of Sales". "Department" is "Sales (AI-Sales)".

Custom Prices: A table with columns: Rate Card, Default, Rate Type, Rate Value, VDS, Price, Default, Comm Type, Comm Value, VCS. The table is currently empty.

Preferences:

- Show in entry list. Causes the code to appear in order, estimate, quote, and invoice value lists.
- Enforce rate card billing. Prevents users from changing the price at entry.
- Enable AvaTax. Sends order and invoice items to AvaTax. Optional code: _____
- Send financial oversight a notification if sold with a margin less than: 0
- Exclude customer discount. Prevents the customer discount from being applied to this code at entry.
- Send notice when ordered. Sends 'Line Item Code Ordered' notice when an order or PO is opened.

- PTO flag — Identifies the LIC as personal time off. These LICs are typically connected with an open 'in-house' order where your company is specified as the customer. For additional granularity, you can create related Jobs linked to the 'house' order.
- Non-Billable Time flag — Prevents hours attributed to this LIC from being charged

to a customer. This affects the job cost approval process.

- Est Unit Cost – The rate in this field is visible to other aACE users (e.g. on sales estimates). To maintain appropriate privacy, we recommend that you calculate the Est Unit Cost to include the average Bill Rate of *all* team members involved in the labor task, *plus* the overhead costs.

Note: If you calculate commissions for labor costs based on margins, also bear in mind that the estimated unit cost will impact commission calculations (i.e. lower estimated unit costs equate to higher estimated margins).

Time Management Preferences

Your system administrator can customize timesheet functionality from the User Group settings, the system Fulfillment preferences, and the accounting Data Entry preferences:

User Group Preferences

Timesheet access privileges here control whether users can create timesheets and what other tasks they can complete – Menu > System Admin > [User Groups](#).

For users to generate timesheets for *other* team members, the User Group must have the Timesheet Management flag marked.

System Preferences

Time management preferences here focus on generating timesheets and posting hours – Menu > System Admin > Preferences > Fulfillment:

- Generate time entries from call dialog – When this flag is marked, each time a team member clicks the Main Menu's link for New Call Entry it starts a time clock. Completing the Call Dialog screen stops that clock and adds a line on the team member's timesheet.
- Allow time to be posted to closed jobs from Timesheets – We recommend that this flag be left unmarked, requiring team members with unsubmitted timesheets to discuss time-keeping policies with a supervisor before being able to submit their delinquent records.
- The maximum hours for a timesheet is – Can be used to prevent some data entry errors, as well as to support policies for daily or weekly time entry.

Accounting Preferences

Timesheet preferences here focus on approvals and purchases – Menu > Accounting > Preferences > Data Entry:

- Generate GL entries from timesheets upon approval – Leave this flag *unmarked* if your company policies do *not* require an actual expense for every line on a user's timesheet or if users only submit timesheet entries for a sub-set of the time they work.
- Allow timesheets to auto-approve – When this flag is marked, timesheets are automatically updated to Approved status as soon as they are submitted.
- Allow purchases to be generated from timesheets for freelancers – Read more about [freelancer timesheets](#).

Team Members

Individual details for time-tracking can be specified for each [team member record](#).

Navigate to Menu > Internal > Team Members, locate the desired team member, then edit the timesheet fields on either the Member Details or the Human Resources tab:

Member Details Tab

The screenshot shows the 'Team Member: Mara Harvey (MH)' form in the 'Human Resources' tab. The 'Time / Expenses' section is circled in red. It contains the following fields:

- Timesheet Approver >**: Denise James
- Expense Approver >**: Drew Sanderson
- Do not create timesheets on:**
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday
 - Sunday

Other sections visible in the form include:

- General Info:** Photo, Title (Account Manager), Type (Employee), Start Date (09/18/17), End Date.
- Contact Info:** Email (mara.harvey@aacmesolutions.com), SMS ((555) 458-9574), Phone ((555) 418-9777), Extension (123), Primary Office, Direct Phone ((555) 816-575), Mobile ((555) 458-9574).
- Best Way to Reach:** (Empty field)
- Office Info:** Office > (aACME, Inc.), Department (aACME, Inc.), Supervisor > (Denise James).
- Timesheet Line Item Codes:** Table with columns: Line Item Code, Notes, Default.

- Timesheet Approver – Select who will oversee this team member’s timesheets.

- No Timesheet Days – Select any days when the system should *not* automatically generate a timesheet for this team member.
- Timesheet Line Item Codes – Select the line item codes this team member will typically work on. These LICs will be suggested first when the team member fills out a timesheet. You can mark the Default flag for one LIC, which aACE will automatically enter on the timesheet.

Human Resources Tab

The screenshot displays the 'Team Member: Mara Harvey (MH)' profile in the 'Human Resources' tab. The 'Compensation Setup' section is circled in red and contains the following data:

Payroll ID	Pay Rate	Multiplier	Bill Rate	Commission Type	Comm %
12345	24.85	1.5	37.28	Not Applicable	0%

Other visible fields include: Home Address (Attn: Mara Harvey, 123 Main Street, New York, NY 10001), Signature (Dimensions: 210px wide by 35px tall, File Format: JPEG or PNG, RGB colorspace), and Important Dates (table with columns: Date, Description, Notes, Team Member, Team, Reminder, Annual).

- Pay Rate – The team member's base hourly salary/wage rate.
- Multiplier – A number used to convert the base Pay Rate to the Bill Rate, typically provided by your payroll service to account for additional costs or compensations (e.g. taxes, health benefits, etc).
- Bill Rate – The actual hourly rate that the payroll service bills you for the team member. This will be used in GL transactions when timesheets are approved, if applicable.
- Freelancer – Mark this flag for [team members who are paid with purchases](#).

Note: If you have salaried employees, their time entries may vary from typical 40-hour / week expectations and may need additional GL transactions.

Automated Schedule for Timesheets

Timesheets can be created manually, but typically they are generated with an automated schedule:

1. Navigate to **Menu > System Admin > Preferences > Automation Schedules**.
2. Mark the flag for **Auto-Generate Daily Timesheets**.

3. [Adjust the automated schedule](#), as needed.
4. Click **Commit Updates**.

When this schedule runs, it generates timesheets according to each team member's Time / Expenses settings (see above).

Additional Considerations

Depending on your company policies, you may also need to create an ongoing, internal order and related jobs for time off, meetings, and other non-billable codes (e.g. House Time).

Likewise, additional steps are involved in setting up [time management for freelancers](#).
