timeFLEX™ for BusinessVision®

Gemini Logic Inc.
2600 Skymark Avenue
Building 10, Suite 101
Mississauga, Ontario L4W 5B2

Tel: 905-625-7212
Fax: 905-625-9644
E-mail: info@geminilogic.com
Internet: www.geminilogic.com

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timeFLEX™ Overview

timeFLEX from Gemini Logic Inc. provides you with a simple and effective way to take control of your billable hours! *timeFLEX* is easy to install and set up, and offers full support for multi-user environments. (*timeFLEX* is licensed on a per workstation basis.)

With *timeFLEX*, you can enter, track and maintain your time and billing information, and automatically generate "ready-to-invoice" orders in BusinessVision's Order Entry module, together with supporting billing documentation.

timeFLEX Setup

Setting up a *timeFLEX* Warehouse and Inventory Items within BusinessVision

You must first enable the Multi-warehousing option within BusinessVision's System Setup module (if it is not already active), and create a new warehouse called "TF" with the description "*timeFLEX* - Time & Billing System".

Set up each "consultant" whose time is to be tracked as an inventory item within this warehouse. It is essential that all inventory items to be tracked in *timeFLEX* are set up in this warehouse, and that they are maintained separately from your other inventory items. Note: Should you wish to set up a warehouse other than "TF" for this purpose, you must change the warehouse setting in *timeFLEX*'s System Setup module accordingly (under Tools - System Setup).

To utilize *timeFLEX* successfully, it is also necessary that the inventory items (i.e. consultants) are set up in a particular format, as follows:

> ConsultantID-ActivityCode
>
> where ConsultantID is the inventory part number, followed by a hyphen (dash), followed by the activity (where required). Note that it is essential that a hyphen is used as the separator.

You may chose to simply establish each consultant as a part number, with no further qualifier, or you may wish to indicate the individual activities performed by the consultant.

You can assign the appropriate sales departments, tax codes and price levels in the normal way, as required. *timeFLEX* honors the twenty selling price levels established within BusinessVision. As time has no impact on cost-of-goods-sold, it is not necessary to establish on-hand quantities.

Setting up BusinessVision and *timeFLEX* Users

<u>Setting up BusinessVision Users</u>

Each "consultant" who is required to enter and track their own time should be set up with their own User ID and Password within BusinessVision's User Details module. Once established in BusinessVision, additional user options can be established directly within *timeFLEX*. Note: BusinessVision users with an authorization level of 9 have complete access to *timeFLEX*'s System Setup and User Detail modules.

Setting up *timeFLEX* Users

From the *timeFLEX* Main Menu, select Tools User Details. It is within this module that you determine who will be able to access *timeFLEX*, and what functions they can access.

- Billing Functions - allows the user to generate a *timeFLEX* order, and post it to BusinessVision's Order file
- User Switching - allows the user to view and enter time and billing information for any consultant/item
- View Rates - determines whether or not the user can view the applicable billing rates
- Edit Notes - allows the user to edit the default notes

Establishing Default Notes

From the *timeFLEX* Main Menu, select Tools—Edit Default Notes to add, modify and delete the default notes to be printed on the various billing statements.

The Sequence No. is assigned by the user, and determines its position in the browse window. If the note is used often, it should be given a low sequence number in order for it to appear at the top of the list. The note can be up to 255 characters long.

Using *timeFLEX*

Once you have completed the initial setup procedures, you are ready to start using *timeFLEX* to track your time and billing.

Entering the Data

The "consultant" (or authorized person) logs onto *timeFLEX*, and tracks their time by entering the information into the Data Entry grid.

- Client - The Client list comprises the BusinessVision Customer file. Enter the Customer Number or click the Browse icon to select the client from the Browse window.
- Activity Code - The Activity Code comprises the inventory items established in the BusinessVision "TF" warehouse, related to that consultant.
- Date - Enter the appropriate date from the calendar.
- Hours - Specify the number of hours to be billed.
- Rate & Amount - The rates are pulled from the BusinessVision Inventory file. Rates can only be viewed and/or modified by those users with the appropriate authorization.
- Notes - Enter a freeform note (up to 2048 characters), or click the Notes icon to select from the Default Notes list.

Click Tab to complete the entry, and clear the grid for the next item.

Note: An item can be placed "on hold" by checking the Hold Billing checkbox, so that it is ignored during the billing process. Items on hold are highlighted in red.

Generating the Billing

To generate the billing details and create an order in the BusinessVision Order file, select Billing—Generate Billing from the Main Menu. Specify the date range, consultant and client, then click Generate Billing. Note that with the appropriate authorization, the user can generate billings for all consultants and/or all clients at the same time. A message advises the order number of the order(s) that has been created in BusinessVision's Order file. The order can then be processed directly from the BusinessVision Order Entry module, in the normal manner.

Restoring Billing Details

Should you wish to restore the billing details to the *timeFLEX* file, select Billing—Restore Billing Details from the Main Menu. Enter the BusinessVision order number, then click Restore Billing. Note: This function does NOT delete the order from the BusinessVision Order file. Should you wish the order to be deleted, you must do so in BusinessVision's Order Entry module.

Processing the Invoice

Once the billings have been generated, the orders can be processed within the BusinessVision Order Entry module. In addition to the regular BusinessVision invoice, a Billing Details Form can also be printed to accompany the client's invoice. From the BusinessVision Main Menu, select File—Printer Setup—Invoice—Forms Setup—Details, and add the following supplementary form:

> your_businessvision_data_directory\timeflex\Billing Details.rpt

This supplementary form can be modified using the BusinessVision Crystal Report Designer to suit your particular requirements. File DDFs are located in the *timeFLEX* folder, located in your BusinessVision data directory. Note: The Billing Details can be printed directly from within *timeFLEX* under the Reports menu.

timeFLEX Reporting

Billing Details - The Billing Details Form provides additional backup documentation to accompany the regular BusinessVision invoice, and can be printed directly from *timeFLEX* or as a supplementary form when printing the invoice. (From the BusinessVision Main Menu, select File—Printer Setup—Invoice—Forms Setup—Details, and add the following supplementary form: your_businessvision_data_directory\timeflex\Billing Details.rpt).

Billing Review - The Billing Review provides a summary of items awaiting billing. Note that items on hold are highlighted in red.

Time Sheet - The Time Sheet Report generates a report that indicates the consultant, client, date, and number of hours worked. This useful report can be given to the client in order to obtain the client's approval and signature, thus preventing any possible billing disputes.

Purchasing *timeFLEX*

Initially, *timeFLEX* can be run in "trial" mode for a period of fifteen days. To purchase *timeFLEX*, follow the instructions below to receive a License Key.

Logon to *timeFLEX* and click the Purchase button on the Trial Status screen. Select the company from the Company Selection List and enter your User Name and Password. Click Print. Complete the printed Registration Form, with payment method, and fax to Gemini Logic Inc. at 905-625-9644. Your License Key will be e-mailed/faxed to you within two business days.

Entering Your License Key

Logon to *timeFLEX*, and click the License Key button. Enter the Registered Name and License Key that was provided to you, and click OK. (Note that this information is case-sensitive and should be entered exactly as detailed.) This completes the registration process.

Transferring Your License to Another Workstation

timeFLEX is licensed on a per workstation basis. Should you need to transfer an existing license to a new workstation, follow the steps below. Note that once these steps are completed, *timeFLEX* will be disabled on the original workstation.

1. Go to www.geminilogic.com and download *timeFLEX* to the new workstation.

2. Launch *timeFLEX* and note down the new product Registration Number from the Trial Status screen or print the registration form.

3. On the workstation where *timeFLEX* was originally registered, go to a Windows command line prompt: Start→Run→Cmd, then click OK.

4. Change directory to the folder where timeFLEX was installed (e.g. CD C:\programfiles\geminilogic\timeflex).

5. Type `timeflex /TRANSFER XXXX-XXXX-XX` (where `XXXX-XXXX-XX` is the Registration Number noted in Step 2 above).

6. A file called "TRANSFER.TXT" is written to the original program directory, and NotePad displays the Registered Name and License Key that can be used to license the new workstation.

7. Launch *timeFLEX* on the new workstation, click the License Key button, and enter the Registered Name and License Key. Click OK. This completes the license transfer process.

For assistance on any registration or licensing issue, please call us at 905-625-7212.

System Requirements

- BusinessVision Limited, Small Business, Standard or Client-Server SQL Edition, Version 7 or higher
- Windows 2000 or Windows XP operating system
- 20 MB of free disk space