



Telephone Timesheets User Guide

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Telephone Timesheets

Table of Contents

1. Video Introduction	6
2. Overview	7
3. Administrative Portal	8
3.1. Password Reset	11
3.2. Employees	14
3.2.1. Adding Employees	16
3.2.2. Editing Employees	21
3.2.2.1. Active/Inactive Employee Status	22
3.2.2.2. GPS Location Tracking	24
3.2.3. Deleting Employees	31
3.2.4. Merging Two Employee Records	33
3.2.5. Transferring Phone Numbers	34
3.2.6. Linking Files To Employee Records	36
3.3. Jobs	40
3.3.1. Adding Jobs	41
3.3.2. Editing Jobs	45
3.3.2.1. Active/Inactive Job Status	46
3.3.2.2. Using Time Budgets	47
3.3.2.2.1. Adjusting Hours Based On Budgets	48
3.3.3. Deleting Jobs	51
3.3.4. Breaks	52
3.3.4.1. Automatic Unpaid Breaks	53
3.3.4.2. Employee-Initiated Unpaid Breaks	54
3.3.4.2.1. Enable Breaks By Calls & Texts	55
3.3.4.2.2. Employee Reminder: Start Break	56
3.3.4.2.3. Employee Reminder: End Break	57
3.3.4.2.4. Break Violations Reporting	58
3.3.4.2.5. Employee Break Confirmations	60
3.3.4.2.6. Employee Warning: Short Break	62
3.4. Schedules	64
3.4.1. Adding Schedules	66
3.4.2. Editing Schedules	71
3.4.2.1. Multi-Day Jobs	72
3.4.3. Deleting Schedules	74
3.4.4. Time Off Tracking	75
3.4.5. Allow Employees To Retrieve Their Schedule	78
3.4.6. Editing An Individual Shift	79
3.4.7. Offering Shifts	80
3.5. Notifications	82

3.5.1. Adding Notification Profiles	83
3.5.2. Editing Notification Profiles	87
3.5.2.1. Linking Jobs To Notification Profiles	88
3.5.3. Deleting Notification Profiles	90
3.5.4. Pausing & Disabling Notifications	91
3.6. Time Entries	93
3.6.1. Adding Time Entries	94
3.6.2. Editing Time Entries	96
3.6.3. Deleting Time Entries	97
3.6.4. Click -to-Call From Time Entry	98
3.6.5. Troubleshooting Time Entries	100
3.7. Integrations	102
3.7.1. QuickBooks	103
3.7.1.1. QuickBooks Online	104
3.7.1.1.1. Setup Integration	105
3.7.1.1.2. Importing Employees	108
3.7.1.1.3. Viewing Import Logs	110
3.7.1.1.4. Importing Customers & Service Items	111
3.7.1.1.5. Associating Customers & Service Items To Jobs	112
3.7.1.1.6. Exporting Time Entries	113
3.7.1.1.7. Delete QuickBooks Online Integration	114
3.7.1.2. QuickBooks Desktop	116
3.7.1.2.1. Setup Integration	117
3.7.1.2.2. Importing Employee Data	118
3.7.1.2.3. Uploading QuickBooks Data Into Telephone Timesheets	120
3.7.1.2.4. Entering QuickBooks Payroll Items In Telephone Timesheets	124
3.7.1.2.5. Associating Customers & Service Items To Jobs	126
3.7.1.2.6. Importing Time Entries Into QuickBooks Desktop	127
3.7.1.2.7. Delete QuickBooks Desktop Integration	129
3.7.2. ADP	131
3.7.2.1. Setup Integration	132
3.7.3. When To Work	142
3.7.3.1. One-Time Setup Instructions	143
3.8. Reports	147
3.8.1. Adding Reports	148
3.8.2. Editing Reports	151
3.8.3. Deleting Reports	152
3.8.4. Running Reports	153
3.8.5. Report Types	154
3.8.5.1. Suspect Time Entries	155
3.8.5.2. Employee Summary	156
3.8.5.3. Job Summary	157

3.8.5.4. Employee & Job Summary.....	158
3.8.5.5. Payroll Report.....	159
3.8.5.6. Payroll (Overtime).....	160
3.8.5.7. Payroll with US Holiday & Overtime Hours.....	161
3.8.5.8. QuickBooks Desktop Export	162
3.8.5.9. Time Entries Dump	163
3.8.5.10. Missing Transactions	164
3.8.5.11. New Employee Summary.....	165
3.9. Admin.....	166
3.9.1. Settings	167
3.9.1.1. General	168
3.9.1.2. Company Profile	171
3.9.1.3. Employee Scoring.....	172
3.9.1.4. Employee Application	173
3.9.1.5. Inbound Call Blocking	175
3.9.1.6. Checklist Reports	176
3.9.1.7. Portal Preferences	179
3.9.1.8. Archived Files	181
3.9.1.9. Call Center	182
3.9.2. Billing.....	183
3.9.3. Supervisors.....	185
3.9.3.1. Adding A Supervisor	186
3.9.4. Announcements	189
3.9.4.1. Adding Announcements	191
3.9.4.2. Editing Announcements	194
3.9.4.3. Deleting Announcements	195
3.9.5. Contacts	196
3.9.5.1. Adding Contacts	197
3.9.5.2. Editing Contacts	200
3.9.5.3. Deleting Contacts	201
3.9.6. Stations	202
3.9.6.1. Adding Stations	204
3.9.6.2. Editing Stations	206
3.9.6.3. Deleting Stations	207
3.9.6.4. On-Site Station Setup	208
3.9.7. Bill / Pay Rates	209
3.9.7.1. Bill/Pay Rates Hierarchy	210
3.9.8. Audit Log	212
3.9.9. Comm Log	213
3.9.10. Change Password.....	214
3.9.11. Close Account.....	215

4. Employee Phone Clock-in System..... 216

4.1. Phone Clock-in: Customize How Employees Choose Jobs	217
4.1.1. Phone Clock-in: Choosing By Job Name	218
4.1.2. Phone Clock-in: Choosing By Job Code	219
5. Employee Web Clock-in System	220
5.1. Web Clock-in: Customize How Employees Choose Jobs	225
5.1.1. Web Clock-in: Choosing By Job Name	226
5.1.2. Web Clock-in: Choosing By Job Code	227
6. Two-way Voice Communication System	228
7. Two-way Text Communication System	229
8. Frequently Asked Questions	233
8.1. Free Trial & Sign Up	234
8.2. Pricing & Billing	235
8.3. Setup & Daily Operations	236
8.3.1. Land Line Support	237
9. Employee Instructions	238
9.1. Employee Call-In Instructions	240
9.2. Adding The Employee Web App To Home Screen	242
9.2.1. Employee Web App Clocking In Instructions	245
9.2.2. Submitting Checkpoints	249
9.2.3. Submitting In-Shift Reports	252
9.2.4. Viewing Hours Worked	255
9.3. Enable Location Sharing	258
9.3.1. Details On Apple iOS Location Services	259
9.3.2. Details On Android Location Services	262
10. Getting Support	264
11. Privacy Policy	265

1. Video Introduction



<https://www.youtube.com/embed/ddRkxxapq-c?rel=0>



2. Overview

Telephone Timesheets turns any mobile or land line telephone into a time clock.

Telephone Timesheets goes beyond just providing a time clock. We link that time clock to an Artificial Intelligence (AI) system that provides many valuable benefits, including:

- Capturing timesheet entries at the time they occur — to the second. No more paper timesheets, filled out by the employees, when they get around to it, based on what they remember.
- Adding up hours worked by employee, and by job if you need job-level detail. Never a math error. Your totals for payroll or other reports will always be accurate.
- Exporting accurate timesheet entries directly to ADP, QuickBooks Online, QuickBooks Desktop, or any system that supports standard format file import or API-based imports. This makes payroll quick and easy. No possibility of transposing a number or making other mistakes that are common when manually entering hours for payroll.
- Providing detailed Time Entry history. We never throw away a Time Entry.
- Enforcing on-time check in and check out. We allow you to maintain one-time or recurring schedules that our AI system uses to call your employees and/or supervisors if an employee fails to check in or out on time.

And the artificial intelligence of the system, makes it pleasantly simple; so much so, that many customers don't do any setup at all — they just sign up and tell their employees to start calling in. Telephone Timesheets does not require any setup for most functions. It is self-learning, and there are no apps to install, so you can have your employees start calling in immediately.

For those who want to take advantage of the more advanced features of the system, like call-out reminders for late employees, reporting, or payroll system integrations (ADP, QuickBooks, etc.), we've created an administrative portal that works on any device with a modern web browser.

The portal has been streamlined and simplified over many years through feedback and requests from thousands of customers. We think you will find it to be very easy to learn and to use.

Thanks for taking time to learn about the system. Remember to use the search feature to find what you're looking for, and please leave feedback using the feedback form at the bottom of every page.

If you need anything beyond what we've covered in this user manual, please don't hesitate to reach out to us via email, chat, or phone.



3. Administrative Portal

Telephone Timesheets is a time clock and daily operations service that has 6 primary components:

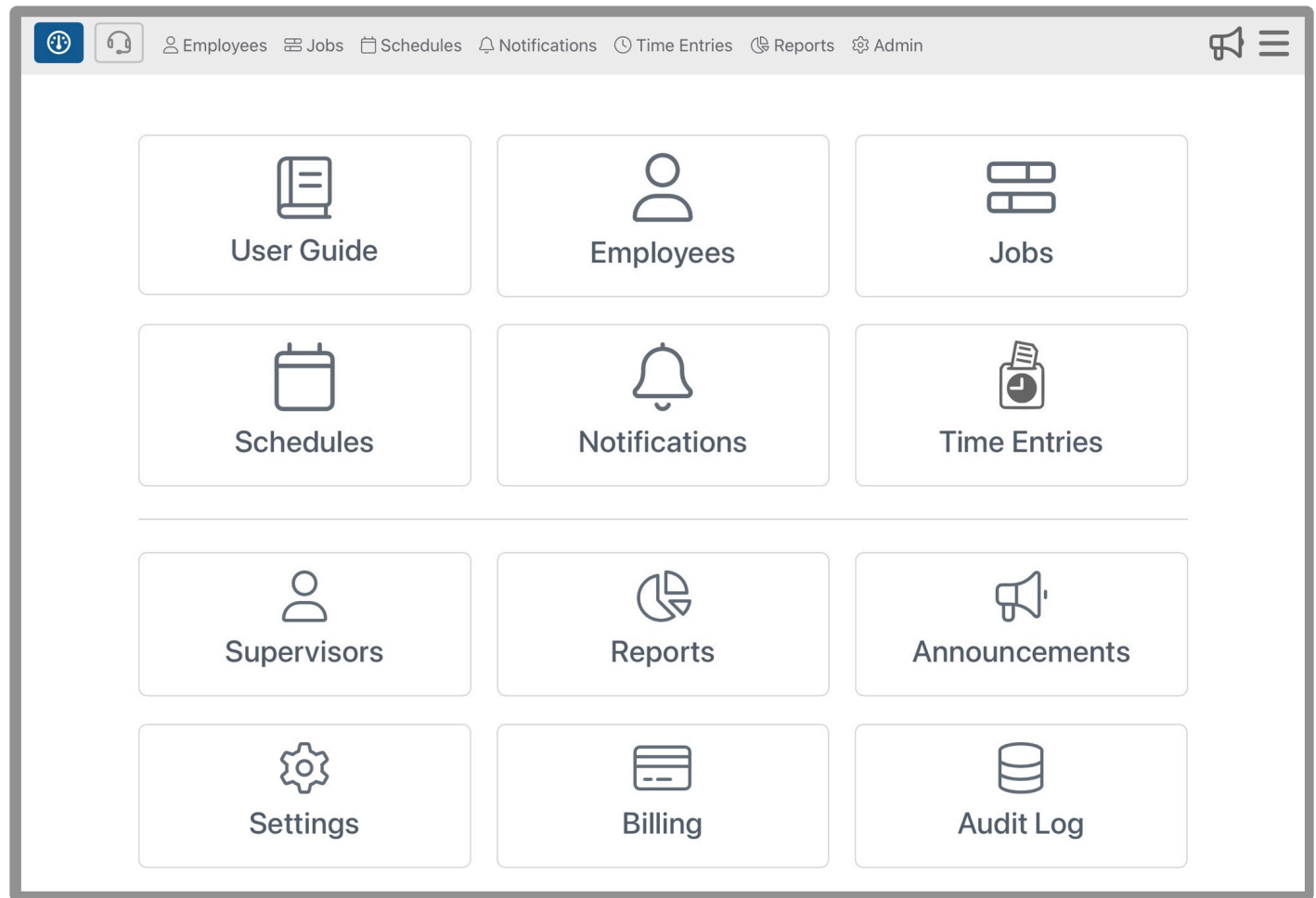
1. The employee phone clock-in system that your employees call to clock in and clock out, as well as other daily functions like submitting in-shift checkpoints.
2. The employee web clock-in system that your employees can use to clock in and clock out from their smart phone's web browser, as well as other daily functions like submitting shift reports, checkpoints, and checkout checklists.
3. The two-way voice communication system.
4. The two-way text communication system.
5. The open API (Application Programming Interface) that administrators can use to integrate in-house and third-party systems with Telephone Timesheets. For example, you may want to synchronize with existing HR or ERP systems that contain employee data, customer data, schedules, etc. The open API allows you to send data to Telephone Timesheets as well as retrieve data from Telephone Timesheets.
6. The administrative portal. This is the responsive web portal that admins and supervisors can use to manage the system, view time entries, view reports, and communicate with the field.

You will be automatically logged in to the **Administrative Portal** as soon as you finish creating your Free Trial account. You'll want to add a bookmark for the portal, so that you can return to it easily. If you are using a smart phone, you will want to add the web page to your Home Screen so that you can access it like any other app directly from your Home Screen.



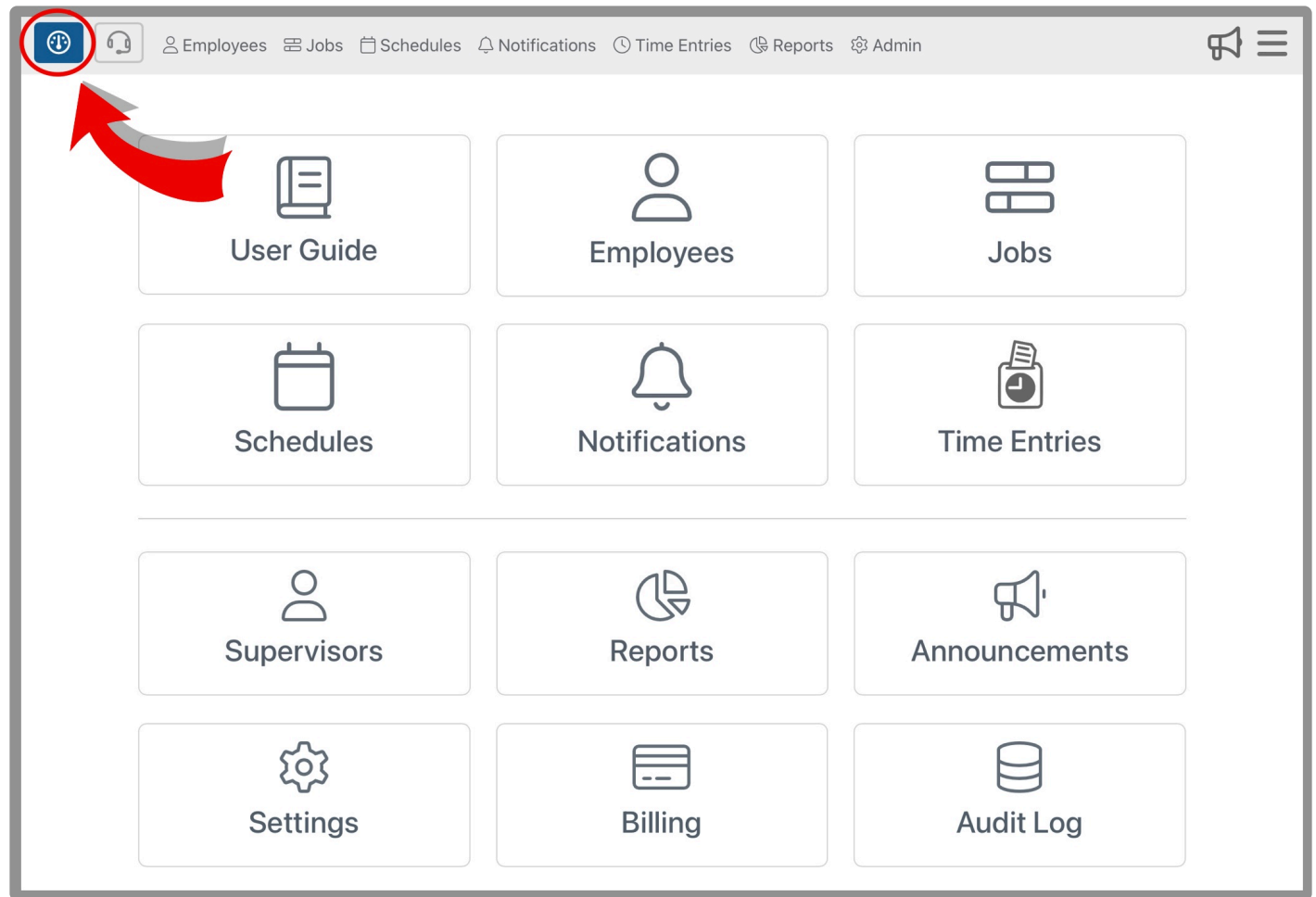
The portal's web address is <https://secure.telephonetimesheets.com>

You can log in to the portal using any device that supports a modern web browser, such as smart phones, tablets, and computers. When you first log in to the portal, you are brought to the **Dashboard**. The Dashboard is where you can find all the sections within Telephone Timesheets



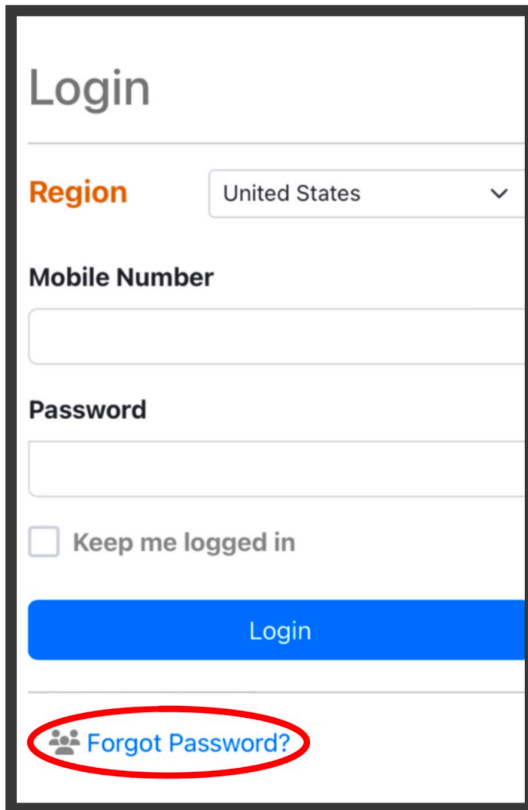
* The Dashboard allows your web browser to load your company's information, so it may take a few seconds to fully populate.

There is a Dashboard button in the upper left corner of the page. This button will always bring you back to the Dashboard view no matter where you are on the Telephone Timesheets website.



3.1. Password Reset

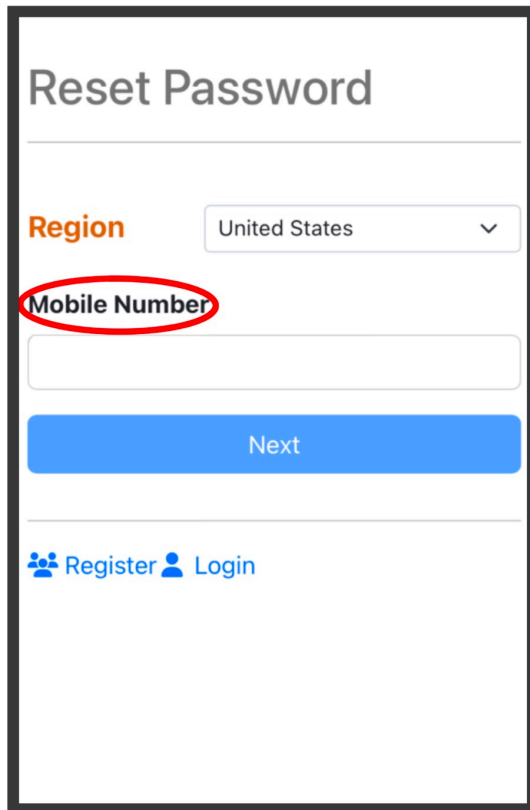
You can reset your password at any time by clicking on the [Forgot Password?](#) link at the bottom of the Login screen.



The screenshot shows a login form with the following elements:

- Login** header
- Region** dropdown menu set to **United States**
- Mobile Number** input field
- Password** input field
- ☐ **Keep me logged in**
- Login** button
- [Forgot Password?](#) link (circled in red)

Next, you will need to enter your mobile number to receive a verification code.



Reset Password

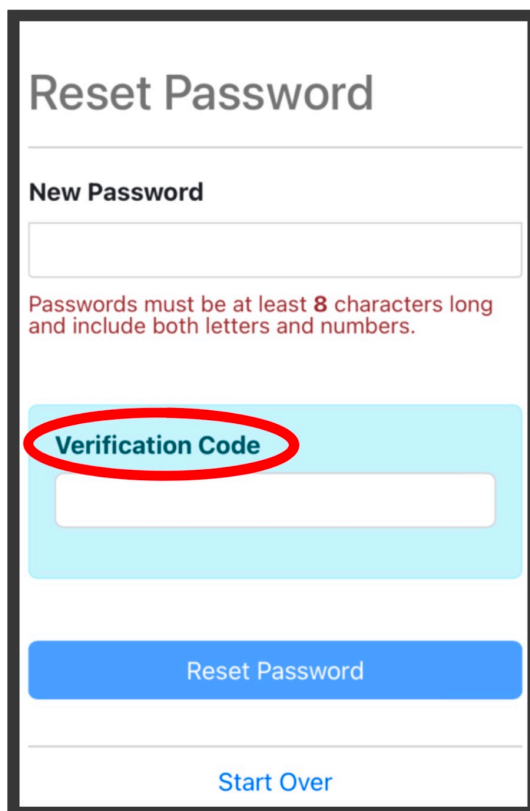
Region United States ▼

Mobile Number

Next

[Register](#) [Login](#)

The system will send a verification code to your mobile phone. You will need to use that verification number in order to set a new password.



Reset Password

New Password

Passwords must be at least **8** characters long and include both letters and numbers.

Verification Code

Reset Password

[Start Over](#)

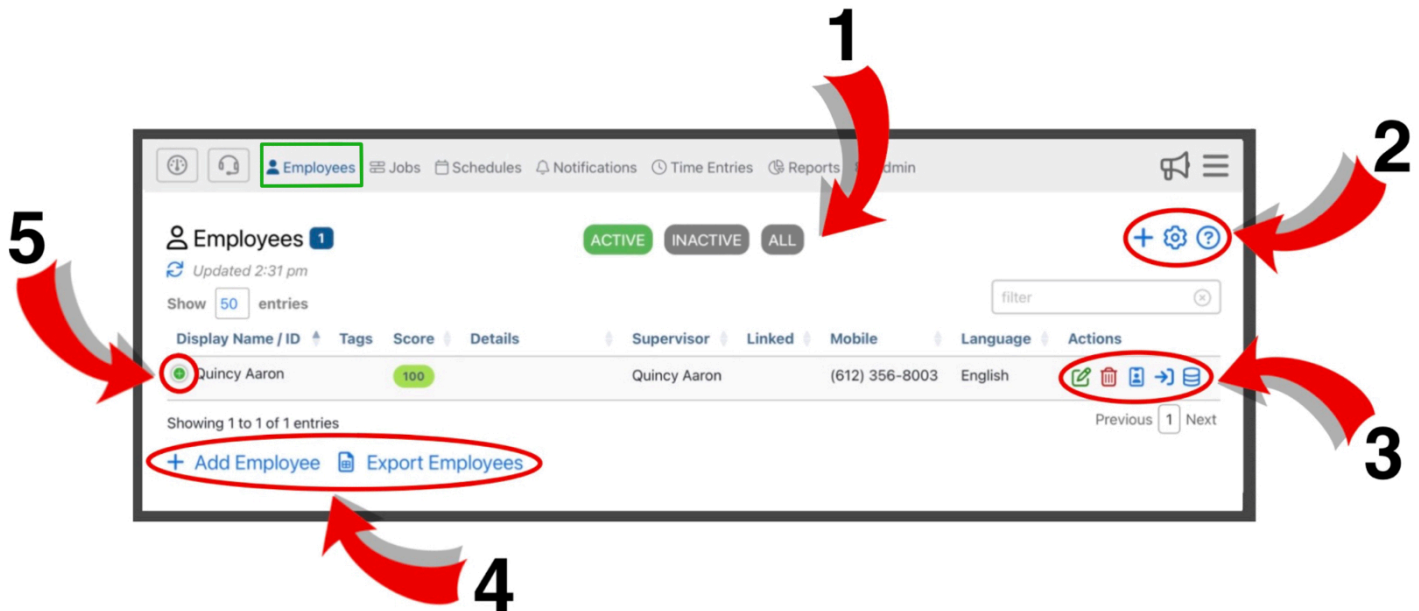
* Click [Here](#) to reset your password






3.2. Employees






Telephone Timesheets can be used without ever entering any employee information. Employees can self-enroll the first time they call in. The system will determine their name, mobile number, and spoken language. English, Spanish, French, Chinese, and Russian are supported. Additional languages added on request. As a best practice, we recommend that you take the time to pre-enter your employees to make the first-call experience quicker and easier for them.



Highlights of The Employees Page




1. Employees are organized into 3 different categories; Active, Inactive, All. You can filter employees using these 3 tabs

2. Here you can add an employee , adjust settings , and find additional information about the employee page .

3. Here you can edit  employees, delete  employees, change the employee web portal preferences , view an employees current clock in status , and audit history 

4. Here, you can add a new employee. This has the same function as the blue plus sign  in the upper right corner. You can also download employee records by clicking  [Export Employees](#)

5. Here you can expand an employee's information by clicking the  icon.



3.2.1. Adding Employees

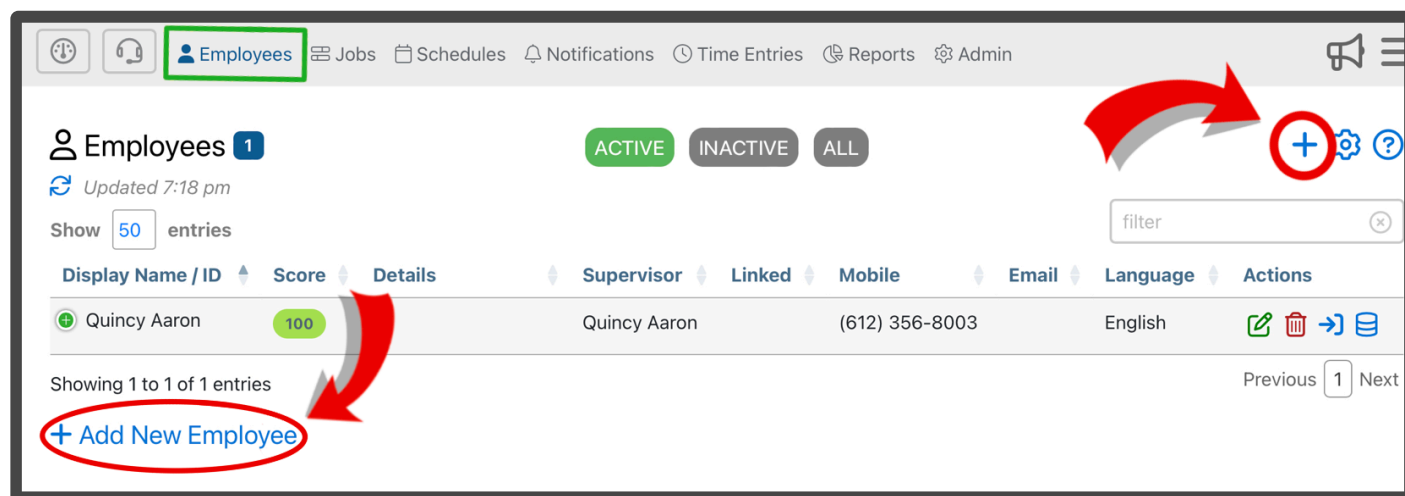
There are 3 ways to add employees to Telephone Timesheets:

1. Allow your employees or subcontractors to self-enroll when they first call in.

✿ Self-enrollment is enabled by default, but can be disabled by going to Admin—> Settings—> General Settings and un-checking the box labeled “Autocreate employees”.

2. Import employees from another system like When To Work, QuickBooks Online, QuickBooks Desktop, ADP, WinTeam, or any other system that supports file exports or API-based exports.

3. Manually add each employee either using the **+** icon in the upper right corner or use the **+ Add New Employee** in the lower left corner of the Employee section of the portal.



This will bring you to the **Add Employee** form where you can enter the Name, Mobile Number, Language, and other details for the new employee.

Highlights of This Form:

First Name

First name of the employee. It is OK to have more than one employee with the same first name.

Last Name

Last name of the employee. It is OK to have more than one employee with the same last name.

Display Name

When entering your employee's first and last name, their display name will auto-fill. However, you can enter a custom display name in this field. This is especially useful if you have 2 employees with the same first and

last name. For example, if you have two employees named James Smith, but one of them goes by Jim and the other goes by Jimmy, you could customize their display names to be Jim Smith and Jimmy Smith.

✿ You can change the Display Name to “last, first” format by going to Admin—> Settings—> Portal Preferences and checking the box labeled “Display Name as Last, First”

! Display Names must be unique. No two employees can have the same Display Name.

Employee Supervisor

This field will not be visible unless more than one Supervisor exists. If more than one supervisor exists, then you will be required to assign a supervisor to each employee. By assigning a supervisor to each employee, you enable the following capabilities:

1. Reports can be filtered based on the employee supervisor. For example, you could filter a report to only show employees that belong to a particular supervisor.
2. Admin Portal permissions can be enforced based on the employee supervisor. For example, you could restrict a supervisor to only be allowed to view time entries that contain employees they are assigned to.

✿ For mor information on employee supervisors, go to the [Supervisors](#) section of the manual.

Phone Number

Each employee must have their own unique 10-digit mobile number. The mobile number is required as it is used by the system as the employees unique identifier, or “Employee ID”. This approach generally works well because all mobile numbers are globally unique **and** they are easy for employees to remember. For the rare case where an employee does not have a mobile number, you can assign a unique 10-digit “phantom” mobile number. For example, 612-555-1234. This is not a real number, but it follows the North American Dial Plan format, and can be used by employees who do not have a mobile phone. Alternatively, you can enable the use of an employee ID for clocking in and out.

! Using an employee ID instead of a Mobile Number is generally not recommended unless your employees are already accustomed to clocking in and out with an employee ID.

✿ In order to use an employee ID for clocking-in, you change your settings by going to Admin—> Settings—> General Settings and check the box labeled “Allow employees to access the system using their External ID”. In this case, the employee ID should be entered in the an **External ID** field. This doesn’t replace the employee’s mobile phone number, rather, it allows employees to clock in using either their External ID **or** their Mobile Number.

Email Address

This is where you can add your employees email. This is optional.

Language

English, Spanish, French, Chinese, and Russian are supported. Additional languages added on request.

Tags

Tags can be used to add searchable labels to an employee, such as CPR trained, Armed, etc. Tags can be especially useful when searching employees for jobs that have prerequisites. The tag function has freeform text, meaning you create any tag that is applicable to your employees. Once you have created a tag it will be saved, that way you can reuse it for other employees.

Add Address

This is where you are able to add an employees address. In order to do so you will need to click **add address +** to add a field for an employee address. This is optional if you'd like to store this information in Telephone Timesheets. This will eventually be useful for jobs where employees that live within a certain area could accept the job.

Supervisor Group (advanced options)

This field will not be visible unless Supervisor Groups are in use. Supervisor Groups can be created under the Admin —> Supervisors menu. By assigning a Supervisor Group to each employee, you enable the following capabilities:

1. Reports can be filtered based on the employee supervisor. For example, you could filter a report to only show employees that belong to a particular supervisor.
2. Admin Portal permissions can be enforced based on the employee supervisor. For example, you could restrict a supervisor to only be allowed to view time entries that contain employees they are assigned to.



For more information on supervisor groups, go to the [Supervisor](#) section of the manual.

External ID (advanced options)

The External ID is used for 2 reasons.

1. To assign an ID that is already in use in an external system, such as a payroll system. The External ID can be entered here manually or in some cases the External ID can be synced automatically with a third party system (e.g. ADP).
2. To assign an ID that can be used as an "Employee ID" for clocking-in and out over the phone. This can be useful in cases where your employees are already accustomed to using their employee ID number for clocking-in and out.

Station Pin (advanced options)

A Station PIN is the number used for employees to clock in at a fixed station such as a tablet mounted to a wall, a lobby PC used as a clock in "kiosk", or even the employee's personal desktop computer. If a station is set up, it can be configured to require the employee to enter their unique Station PIN number for clocking in and clocking out. Note: a Station PIN is not the same as an External ID. A Station PIN cannot be used

while clocking in over the phone.



For more information on stations, go to the [Stations](#) section of the manual.

Employee Details (advanced options)

In this field you can add any additional information you deem important for a particular employee. It's important to note that Employee Details will be displayed in Time Entries.

Department (advanced options)

This field allows you to assign an employee to a department. The department field has freeform text, meaning you create a department that is applicable to your employees. Once you have created a department it will be saved, that way you can reuse it for other employees

Start Date (advanced options)

This field allows you to select your employees Start Date. This can be useful for reports and knowledge on how long that employee has been employed.

Birthday (advanced options)

This field allows you to select your employees Birthday. This is optional for you to store this information in Telephone Timesheets.

Anniversary (advanced options)

This field allows you to select your employees Anniversary. This can be useful if employees get a yearly raise, have annual training, etc.

Base Pay Rate (advanced options)

An employee's Base Pay Rate will be attached to any time entries for that employee unless there is a more specific pay rate assigned. More specific pay rates can be defined at the Job level. Job-specific pay rates can be defined in the Job Edit form, or in the Pay / Bill Rates table.

Mark Employee Active (advanced options)

When an employee is marked as Active they will be visible wherever employees are displayed. If this field is not selected they will be marked as Inactive. Inactive employees will be hidden. This field is preselected, but you can toggle this on an off as you please.



For more information on Active/Inactive employees, go to the [Active/Inactive Employee Status](#) section of the manual.

Use GPS (advanced options)

When Use GPS is selected, that employee will receive a request while clocking in to share their location. If this is not selected they will not be asked to share their location. This is nice for employees who may use a device to check in such as a flip phone that doesn't allow GPS sharing. This field is preselected, but you can

toggle this on an off as you please.



For more information on using GPS, go to the [GPS Location Tracking](#) section of the manual.

Enable Voice Fingerprints (advanced options)


A Voice Fingerprint is an audio recording created by the employee during clock-in. If you have Voice Fingerprints enabled, your employee will be asked to record their name over the phone when they call to clock in. Voice Fingerprints helps to discourage buddy-punching when multiple employees are calling in from the same landline phone. Recorded Voice Fingerprints are visible in each Time Entry.

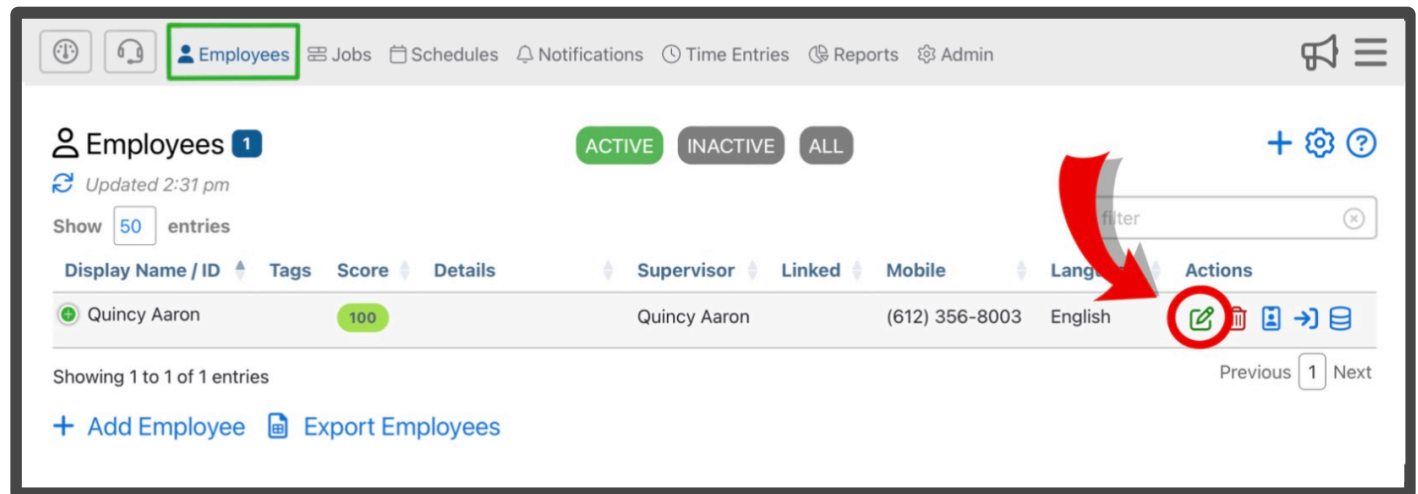
Auto Check In / Out (advanced options)

This feature allows an employee to be automatically clocked in and out for their shift. This could be useful for employees who are paid fixed number of hours. Their number paid hours would be determined by the employees schedule. This feature is hidden. If you would like access to this feature contact support@telephonetimesheets.com




3.2.2. Editing Employees

You can edit an employee's information by clicking on the green edit button  in the Actions column for that employee. This will bring you to the **Edit Employee** form. Here you can modify an employee's information. This will have the same fields as the Add Employee form. Go to the [Adding Employees](#) section of the manual to learn more about the form.



The screenshot shows the 'Employees' management page. The top navigation bar includes icons for a clock, a headset, and the 'Employees' tab (which is highlighted). Below this are links for Jobs, Schedules, Notifications, Time Entries, Reports, and Admin. The main content area has a header for 'Employees 1' with a refresh icon and a timestamp 'Updated 2:31 pm'. There are filter buttons for 'ACTIVE', 'INACTIVE', and 'ALL'. A 'Show 50 entries' dropdown is present. The table below has columns: Display Name / ID, Tags, Score, Details, Supervisor, Linked, Mobile, Lang, and Actions. The first row shows 'Quincy Aaron' with a score of 100. A red arrow points to the green edit icon in the Actions column. At the bottom, there are links for 'Add Employee' and 'Export Employees'.

* If you do not see the green Edit button, it is because the screen is too small and you will need to expand that entry by first clicking on the green plus icon  immediately to the left of the entry.



3.2.2.1. Active/Inactive Employee Status

If you wish to remove an employee from the Admin Portal, they can be marked as an inactive employee. This makes it so that they are no longer visible in the Admin Portal. Additionally, it reduces clutter in pull-down menus and other places where employees are listed. Only active employees will show up where employees are visible; Inactive employees will be hidden.



The active and inactive status of an employee has nothing to do with billing. We bill for any employees who have used the system during your monthly billing cycle, regardless of their status.

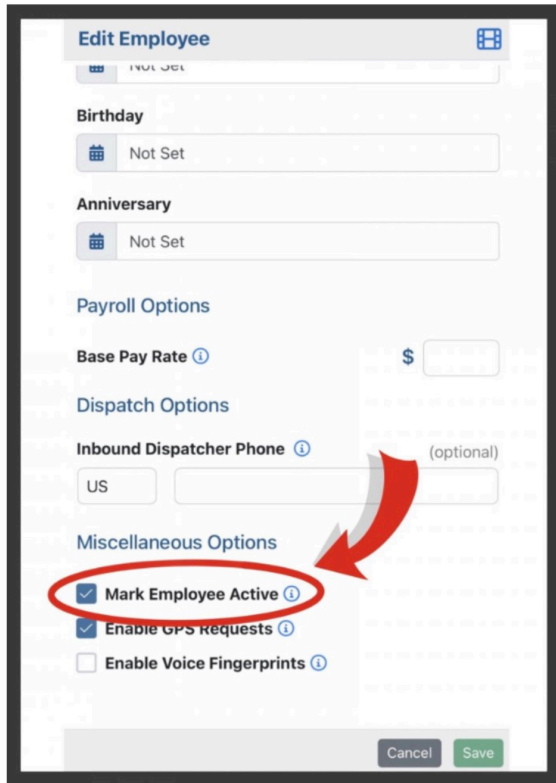
Employees can be marked as active or inactive using the Edit Employee Form. You can find how to access the Edit Employee Form in the [Editing Employees](#) section of the manual.

Once you access the Edit Employee Form, click on the pull-down menu labeled **Advanced Options**.

The screenshot shows the 'Edit Employee' form with the following fields and options:

- First Name** (required)
- Last Name** (required)
- Display Name** (required)
- Phone Number** (required) with a country code dropdown (US) and a text input field.
- Email Address**
- Language** (English)
- + add address** (link)
- Advanced Options** (pull-down menu, circled in red)
- Cancel** and **Save** buttons at the bottom.

Next, scroll down to the bottom of the Advanced Options menu to the section labeled **Miscellaneous Options**. Here you can find the option to **Mark Employee Active**. If this option is not selected it will mark the employee as inactive.



Edit Employee

NOT SET

Birthday

Not Set

Anniversary

Not Set

Payroll Options

Base Pay Rate ⓘ \$

Dispatch Options

Inbound Dispatcher Phone ⓘ (optional)

US

Miscellaneous Options

- ☒ **Mark Employee Active** ⓘ
- ☒ **Enable GPS Requests** ⓘ
- ☐ **Enable Voice Fingerprints** ⓘ

Cancel Save

If an employee has not used the system for 30 days, the system will automatically put employee into an inactive state. As soon as an inactive employee clocks back in, they will automatically become active again.


* Optionally, contact Telephone Timesheets Support if you would like the system to block inactive employees from calling in. In that case, the only way an inactive employee can become active again is if an admin sets them as active.

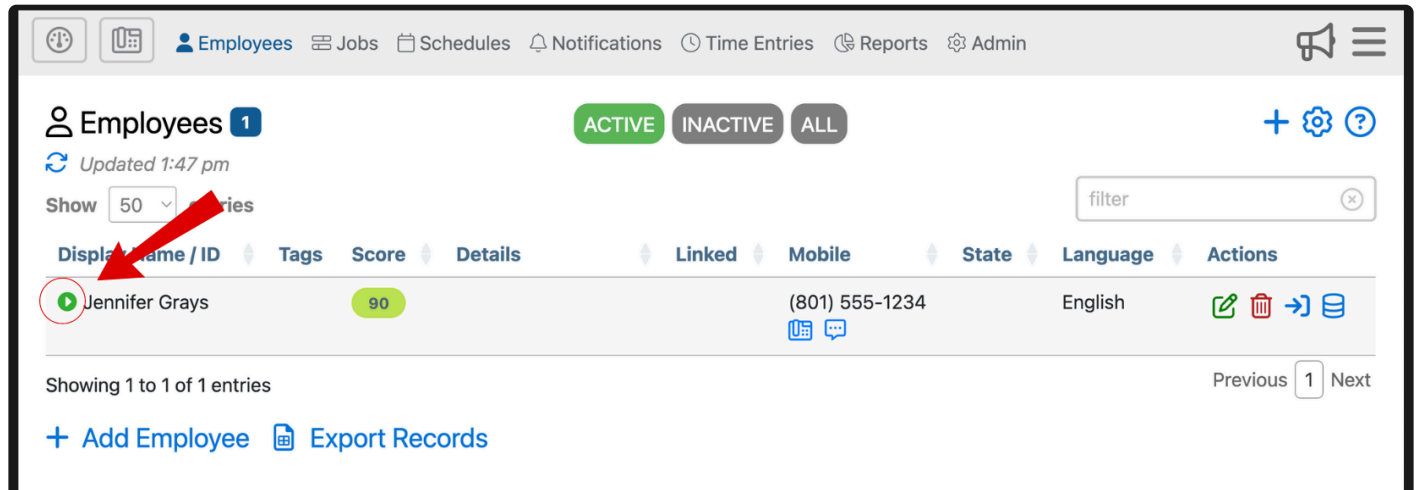


3.2.2.2. GPS Location Tracking

GPS location tracking is enabled on a per-employee basis. By default GPS tracking will be enabled for all employees, but can be disabled through the Admin Portal.

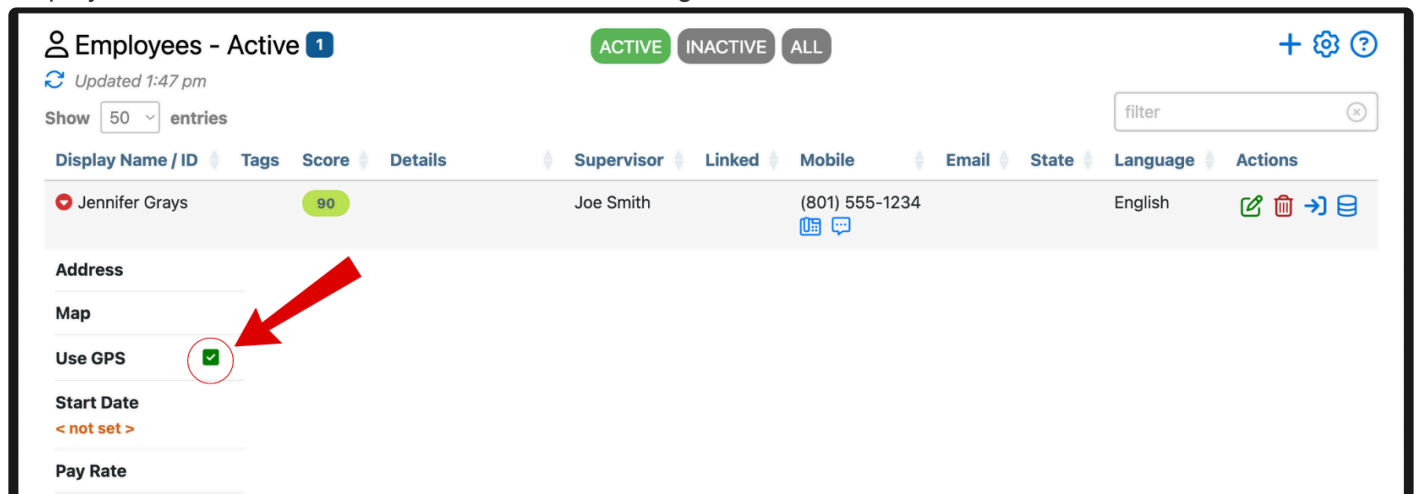
To disable or enable GPS tracking for an employee, access the Employee section of the Admin Portal.

Then, find the desired employee that you wish to disable or enable GPS tracking for. Select the  icon to view additional employee information.




The screenshot shows the 'Employees' section of the Admin Portal. At the top, there are tabs for 'ACTIVE', 'INACTIVE', and 'ALL'. Below the tabs, there's a table of employees. The first employee listed is 'Jennifer Grays' with a score of 90. In the 'Actions' column for Jennifer Grays, there is a green play button icon. A red arrow points to this icon. Below the table, there are links for '+ Add Employee' and 'Export Records'.

Here you can find the checkbox labeled **Use GPS**. Check this box to enable GPS tracking for that employee; uncheck this box to disable GPS Tracking.




The screenshot shows the 'Edit Employee' form for 'Jennifer Grays'. The form includes fields for 'Address', 'Map', 'Use GPS', 'Start Date', and 'Pay Rate'. The 'Use GPS' checkbox is checked, and a red arrow points to it. The 'Start Date' field shows '< not set >'. The 'Pay Rate' field is empty.

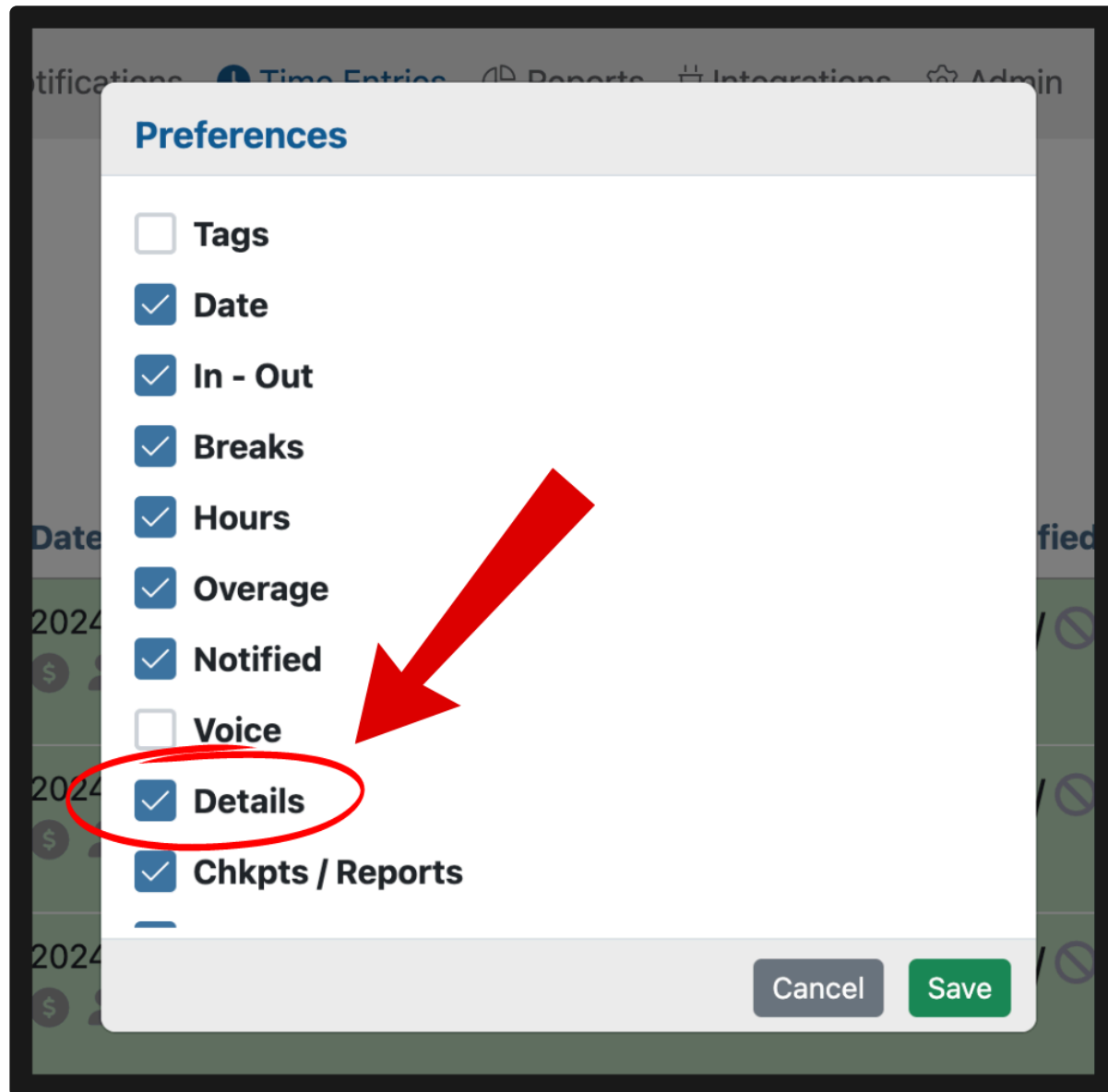
You can also edit an employee's GPS tracking status through the Edit Employee form. You can find how to access the Edit Employee form in the [Editing Employee](#) section of the manual


 GPS sharing will automatically be disabled for any employee who does not share 20 consecutive times. This indicates they can't or won't share so the system stops asking.

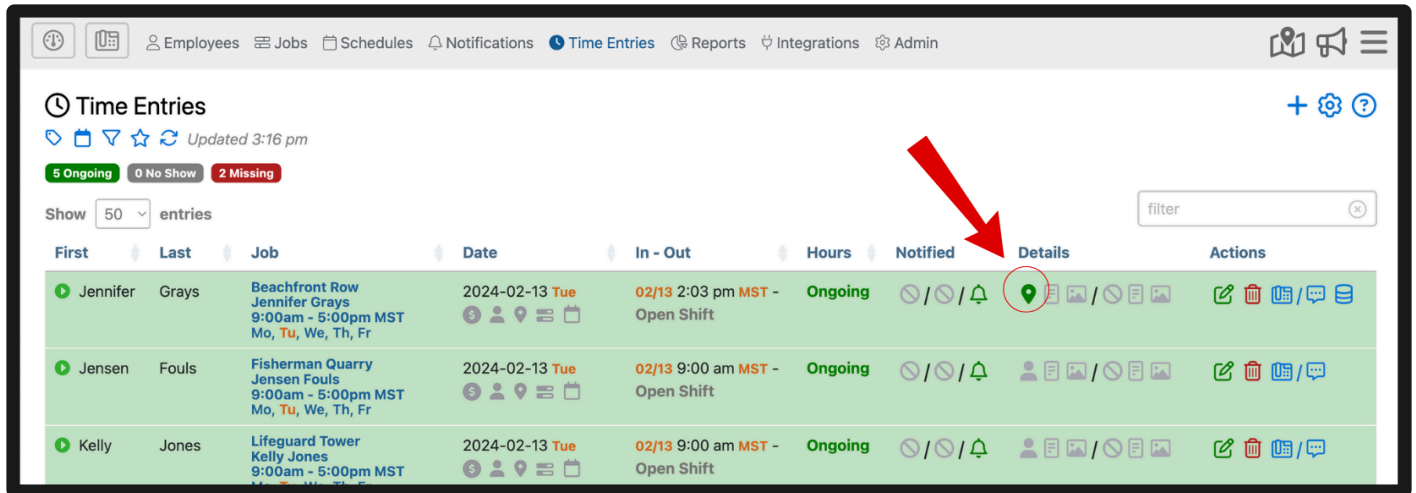
GPS Tracking should be enabled if you want to ensure that employees are actually at the job site when they

clock in and out. This GPS location information will be attached to the employee's time entry in the Time Entries section of the portal.
















If addresses are entered for the job, the system will calculate proximity to the job location and present that proximity information in the time entry. To view your employee's location for each clock in and out, navigate to the Time Entries section of the portal. Ensure that the "details" view of your Time Entries is enabled by selecting the !  icon. Then scroll down until you see "details" and that it is checked.



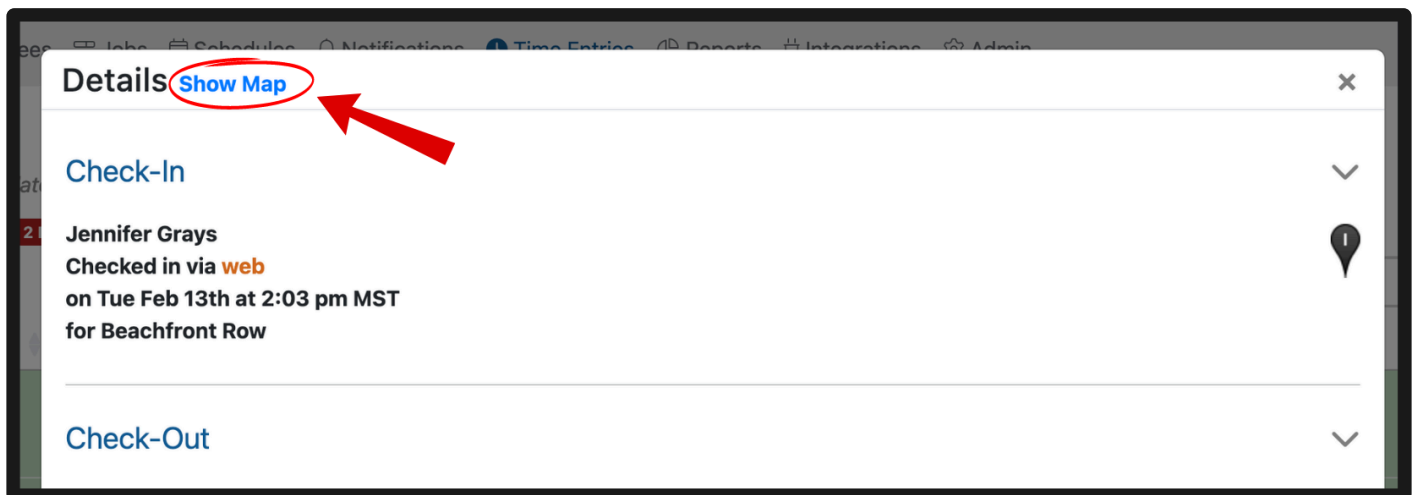
Once your "details" option is checked, click the  icon to open up an array of options.



The screenshot shows the 'Time Entries' dashboard. At the top, there's a navigation bar with icons for Employees, Jobs, Schedules, Notifications, Time Entries (active), Reports, Integrations, and Admin. Below the navigation bar, the 'Time Entries' section is displayed. It includes a status bar with '5 Ongoing', '0 No Show', and '2 Missing' entries. A 'Show 50 entries' dropdown is present. The main table has columns: First, Last, Job, Date, In - Out, Hours, Notified, Details, and Actions. The first row shows Jennifer Grays at Beachfront Row, checked in at 9:00am on Tue Feb 13th. A red arrow points to the 'Details' column header, which has a location pin icon circled in red.

First	Last	Job	Date	In - Out	Hours	Notified	Details	Actions
Jennifer	Grays	Beachfront Row Jennifer Grays 9:00am - 5:00pm MST Mo, Tu, We, Th, Fr	2024-02-13 Tue	02/13 2:03 pm MST - Open Shift	Ongoing	/ / /		   
Jensen	Fouls	Fisherman Quarry Jensen Fouls 9:00am - 5:00pm MST Mo, Tu, We, Th, Fr	2024-02-13 Tue	02/13 9:00 am MST - Open Shift	Ongoing	/ / /		   
Kelly	Jones	Lifeguard Tower Kelly Jones 9:00am - 5:00pm MST Mo, Tu, We, Th, Fr	2024-02-13 Tue	02/13 9:00 am MST - Open Shift	Ongoing	/ / /		   

From there, select “show map” to view the employee’s whereabouts




The screenshot shows the 'Details' modal for Jennifer Grays. The modal has a title bar with 'Details' and a 'Show Map' link. Below the title bar, there's a section for 'Check-In' with the text: 'Jennifer Grays', 'Checked in via web', 'on Tue Feb 13th at 2:03 pm MST', and 'for Beachfront Row'. There's also a 'Check-Out' section. A red arrow points to the 'Show Map' link.

Details [Show Map](#)

Check-In

Jennifer Grays
Checked in via **web**
on Tue Feb 13th at 2:03 pm MST
for Beachfront Row

Check-Out

If the option the details option is checked but not showing up on the dashboard, it could be that your screen size is smaller than the average dimensions. To view employee GPS in this case, select this  icon in the Time Entries tab.

The screenshot shows the 'Time Entries' page with a table of employee shifts. A red arrow points to the 'First' column header.

First	Last	Job	In - Out	Hours	Actions
▶ Jennifer	Grays	Beachfront Row Jennifer Grays 9:00am - 5:00pm MST Mo, Tu, We, Th, Fr	02/13 2:03 pm MST - Open Shift	Ongoing	
▶ Mary	Leeson	Lighthouse Mary Leeson 9:00am - 5:00pm MST Mo, Tu, We, Th, Fr	02/13 9:00 am MST - Open Shift	Ongoing	
▶ Jensen	Fouls	Fisherman Quarry Jensen Fouls 9:00am - 5:00pm MST Mo, Tu, We, Th, Fr	02/13 9:00 am MST - Open Shift	Ongoing	
▶ Kelly	Jones	Lifeguard Tower Kelly Jones 9:00am - 5:00pm MST	02/13 9:00 am MST - Open Shift	Ongoing	

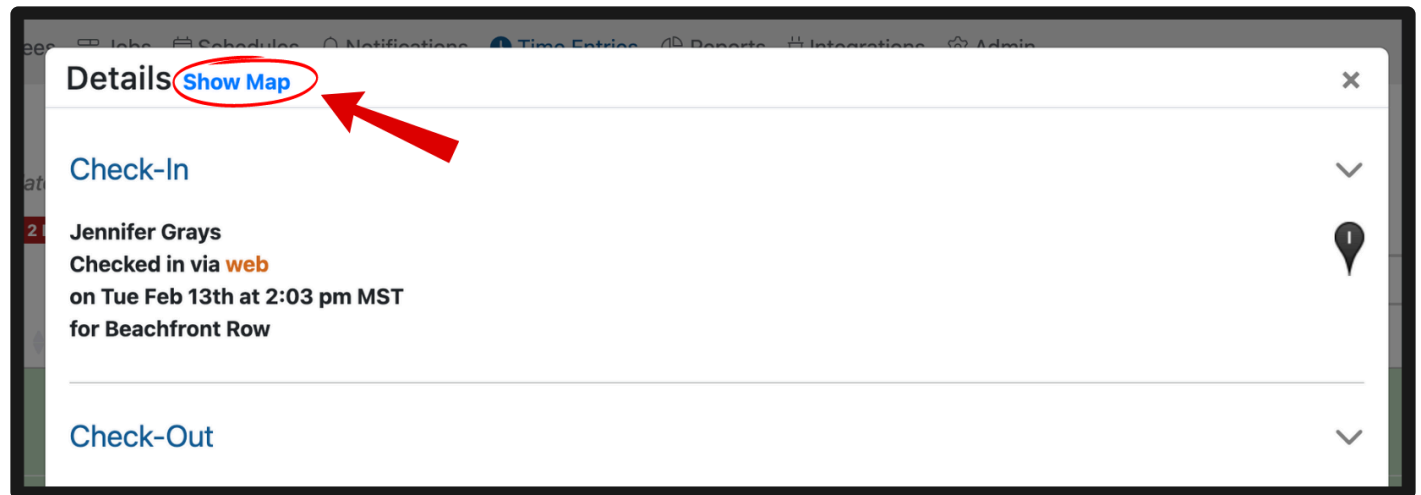
Then, select the icon from the drop down.

The screenshot shows the details for Jennifer Grays. A red arrow points to the location pin icon in the 'Details' section.

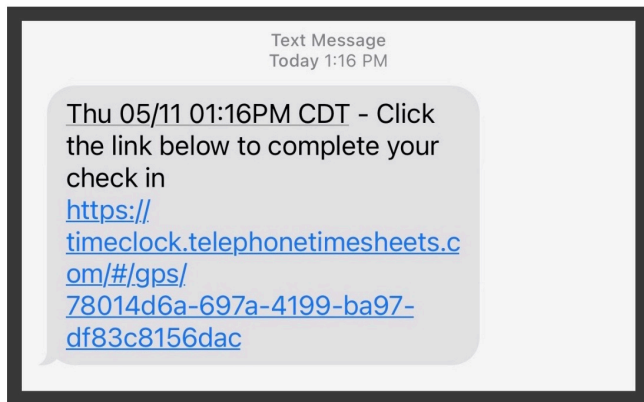
First	Last	Job	Date	In - Out	Hours	Notified	Actions
▶ Jennifer	Grays	Beachfront Row Jennifer Grays 9:00am - 5:00pm MST Mo, Tu, We, Th, Fr	2024-02-13 Tue 	02/13 2:03 pm MST - Open Shift	Ongoing		

Status: **Active**
 IDs: **Emp** **Job**
 Breaks:
 Details:

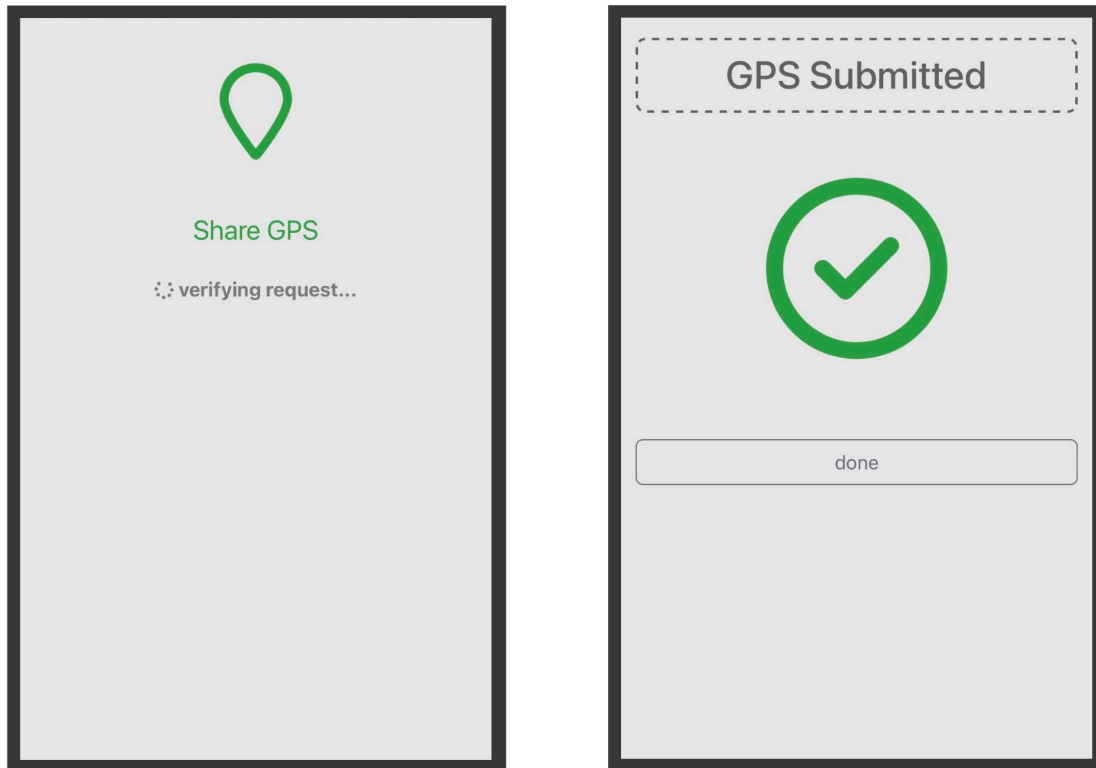
From there, select “show map” to view employee location.



Anytime an employee calls in from their own mobile phone, whether clocking in or clocking out, they will immediately receive a text message asking them to share their location. Be sure the **Enable GPS Requests** checkbox is filled for your employees to receive this message. If you have unchecked it, the employee will not receive GPS tracking text messages.



When the employee clicks on the link, their mobile phone will request permission to see their current location. This is a privacy setting of the mobile phone. Please be sure to tell your employees to allow sharing. If sharing is allowed, they will see that their location was successfully shared.



If sharing is disabled on the employee's phone, follow the instructions below to enable sharing.

Apple:

For Apple devices, enabling GPS sharing is the same for all phones.

Settings —> Privacy —> Location Services —> Safari Websites

Android:

With Android, it varies by device. Google provides a helpful document here.

<https://support.google.com/accounts/answer/6179507?hl=en>

With Android phones, there is one other scenario we have seen when an employee has explicitly chosen **NOT** to share their location. In that case, where “deny” was chosen, all subsequent requests are automatically blocked.

To clear this in Chrome, the employee must follow these steps.

1. Open Chrome.
2. Click on the 3 dots in the top right corner. This will bring up a menu.
3. Click on “Settings”
4. Click on “Site settings”


! Make sure JavaScript is not blocked

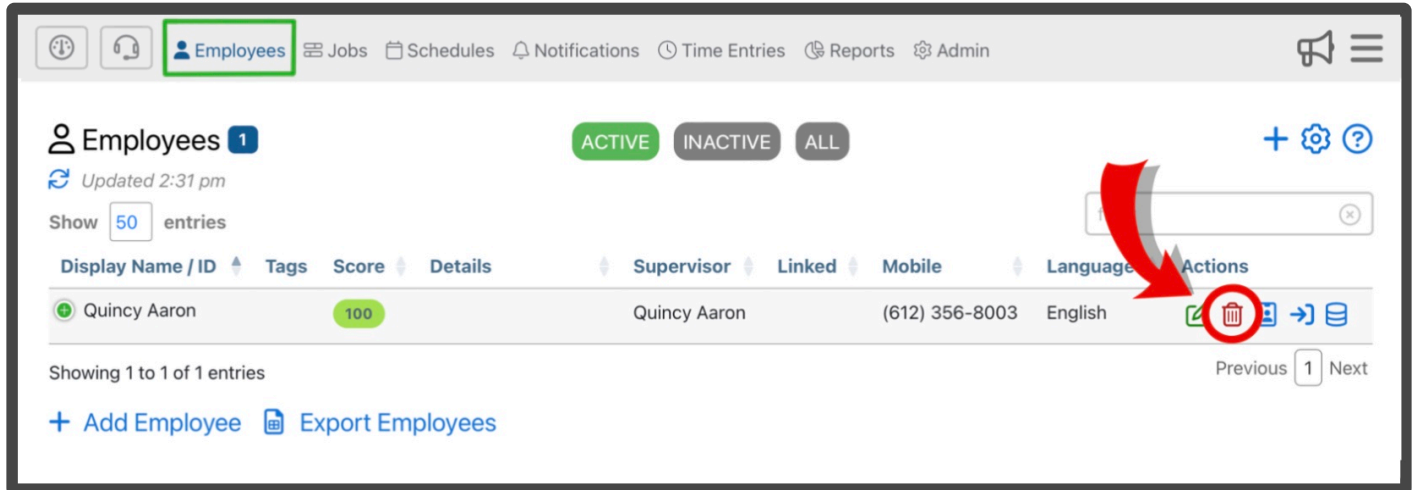
5. Click on "Location"
6. Click on the site <https://gps.telephonetimesheets.com> from the list of blocked sites (it might be the only one in the list)
7. Click "CLEAR & RESET"



3.2.3. Deleting Employees

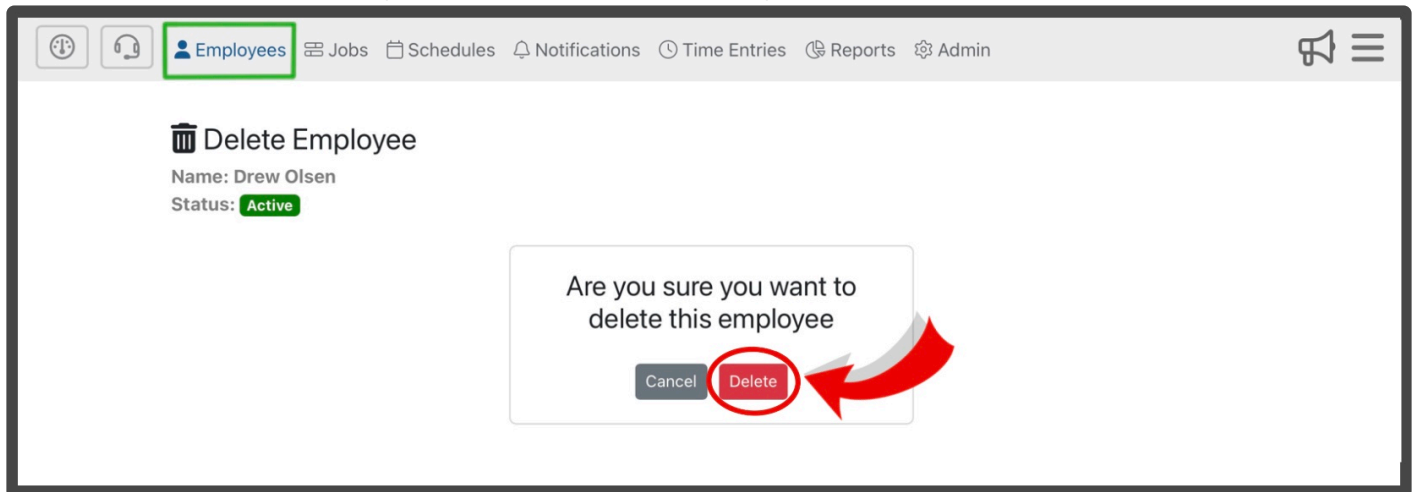
As a best practice, employees should not be deleted. Employees will automatically be marked as Inactive if they have not used the system in 30-days. Optionally, employees can be marked Inactive at any time using the Edit Employee form. Inactive employees will be hidden so they will not clutter up the portal, but if they should ever return, all of their history will be intact.

However, if you choose to permanently delete an employee, click on the red Delete button  in the Actions column for that employee's entry in the table.




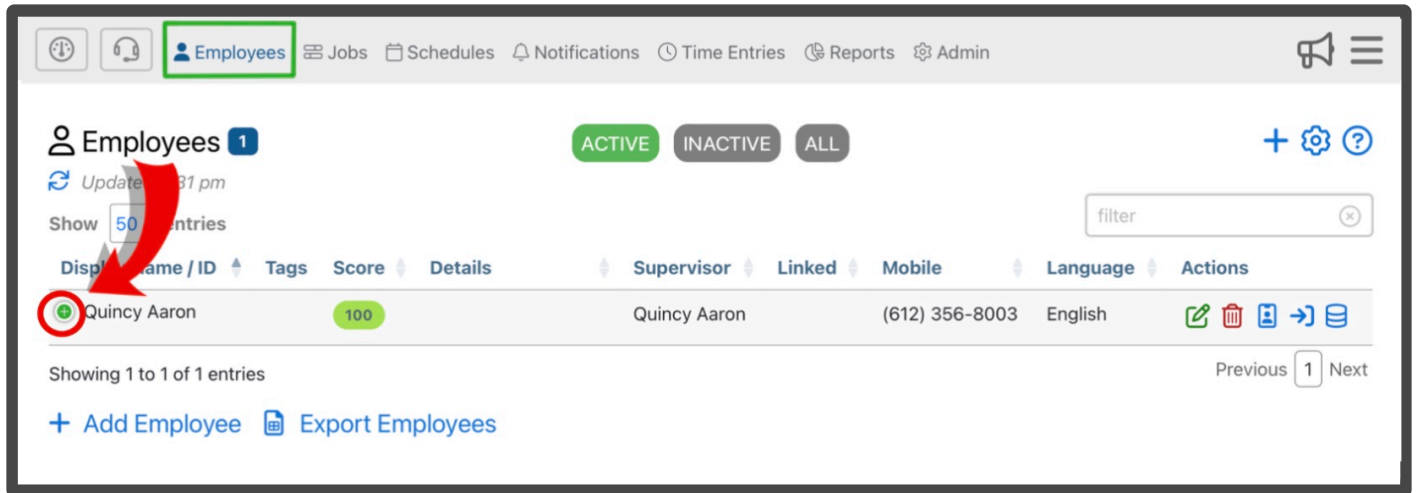
The screenshot shows the 'Employees' management page. The 'Employees' tab is highlighted. Below the navigation bar, there are filters for 'ACTIVE', 'INACTIVE', and 'ALL'. A search bar is present. The table below shows one employee, Quincy Aaron, with a score of 100. The 'Actions' column for Quincy Aaron contains several icons, including a red trash icon (Delete button) which is circled in red. A red arrow points from this icon to the 'Delete Employee' confirmation dialog shown in the next screenshot.

You will need to confirm that you want to delete this employee.








The screenshot shows the 'Delete Employee' confirmation dialog. The dialog asks 'Are you sure you want to delete this employee?' and has 'Cancel' and 'Delete' buttons. The 'Delete' button is circled in red. A red arrow points from this button to the 'Delete Employee' confirmation dialog shown in the previous screenshot.

If you do not see the red Delete button, it is because the screen is too small and you will need to expand the entry by clicking on the green plus icon  immediately to the left of the employee name.



The screenshot displays the 'Employees' management page. The top navigation bar includes icons for a clock, headset, and a highlighted 'Employees' tab, along with links for Jobs, Schedules, Notifications, Time Entries, Reports, and Admin. The main header shows 'Employees 1' with filters for ACTIVE, INACTIVE, and ALL. A 'Show 50 entries' dropdown and a search filter are present. The table lists employee details with columns: Display Name / ID, Tags, Score, Details, Supervisor, Linked, Mobile, Language, and Actions. The first entry is Quincy Aaron, with a score of 100. The Actions column for Quincy Aaron contains a red circle around a '+' icon, which is pointed to by a red arrow originating from the 'Employees' tab. Below the table, it indicates 'Showing 1 to 1 of 1 entries' and provides 'Previous' and 'Next' navigation options. At the bottom, there are links to '+ Add Employee' and 'Export Employees'.

Display Name / ID	Tags	Score	Details	Supervisor	Linked	Mobile	Language	Actions
Quincy Aaron		100		Quincy Aaron		(612) 356-8003	English	    



3.2.4. Merging Two Employee Records

Merging is used when you want to combine the information of 2 different employee profiles into 1. Accounts should only be merged if both profiles are actually the same person. Merging would be used if a preexisting employee gets a new phone number and clocks in from that new number. Our system will auto create a new employee, despite their name being the same. For example, if Sally Jones is an enrolled employee, but gets a new phone number and auto creates a new version of herself. If that employee continues to clock in and out using that new mobile phone number, their time entries would be separate from their preexisting employee profile. By merging their 2 profiles, all records from both profiles are combined.



You can disable the ability for Telephone Timesheets to auto create employee by going to Admin —> Settings —> General Settings —> uncheck the box labeled Autocreate employees

In order to merge their preexisting employee profile to their new employee profile, go to the Edit Employee form on their original profile and change the phone number to be the same as their new one. After doing this, there will be a prompt to merge the 2 employee profiles.

The phone number you entered belongs to another employee.

Press the Merge button to **merge that employee with this employee.**

Do this if both employees are actually the same person.

Merge Employees

Press the Transfer button if you would like to transfer the phone number from the other employee to this employee.

Do this if you are transferring a company-owned mobile phone from one employee to another.

Transfer Phone Number

Notice, there is also the option to transfer phone numbers. To learn more about Transferring, go to the [Transferring Phone Numbers](#) section of the manual.



3.2.5. Transferring Phone Numbers

Transferring is used when transferring a company owned mobile phone from one employee to another. Each employee must have a unique phone number, meaning 2 employees can't share the same company mobile phone number. When transferring a phone number from one employee to another, the system will auto create a new unique mobile number for the employee the number was transferred from. To learn more about how Telephone Timesheets uses mobile numbers while clocking in/out, go to the [Adding Employees](#) section of the manual.

There are 2 ways to transfer a mobile number from one employee to another:

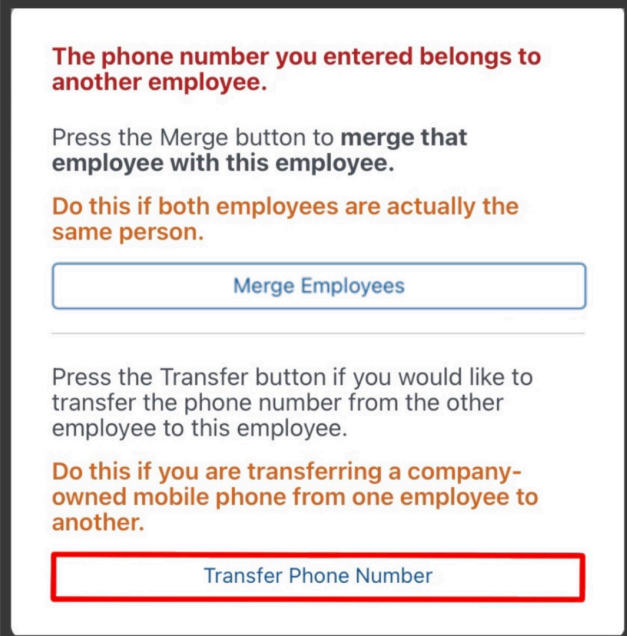
1. Create an employee and enter the desired phone number being transferred to the new employee in the Mobile Number section of the Add Employee form

e.g. Transferring my preexisting employees company mobile phone number (Bob Anderson) to my new employee (Sally Jones).

2. Edit a preexisting employee and enter the desired phone number being transferred from another preexisting employee in the Mobile Number section of the Edit Employee form

e.g. transferring my preexisting employees company mobile phone number (Bob Anderson) to another preexisting employee (Martin Smith).

You will be prompted to transfer the phone number.



The phone number you entered belongs to another employee.

Press the Merge button to **merge that employee with this employee.**

Do this if both employees are actually the same person.

Merge Employees

Press the Transfer button if you would like to transfer the phone number from the other employee to this employee.


Do this if you are transferring a company-owned mobile phone from one employee to another.

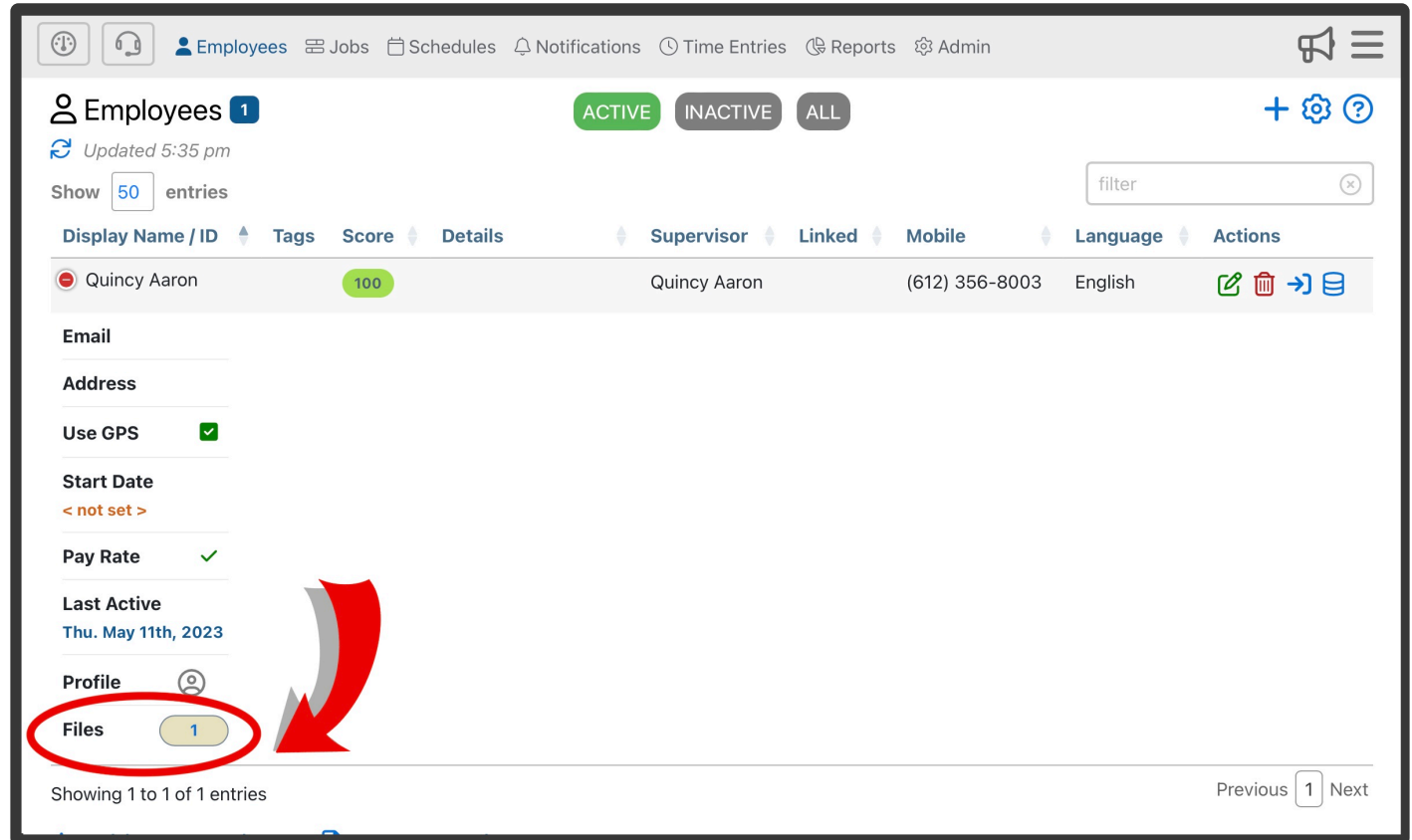
Transfer Phone Number

Notice, there is also the option to merge employees. To learn more about merging employees, go to the [Merging Two Employee Records](#) section of the manual.







3.2.6. Linking Files To Employee Records

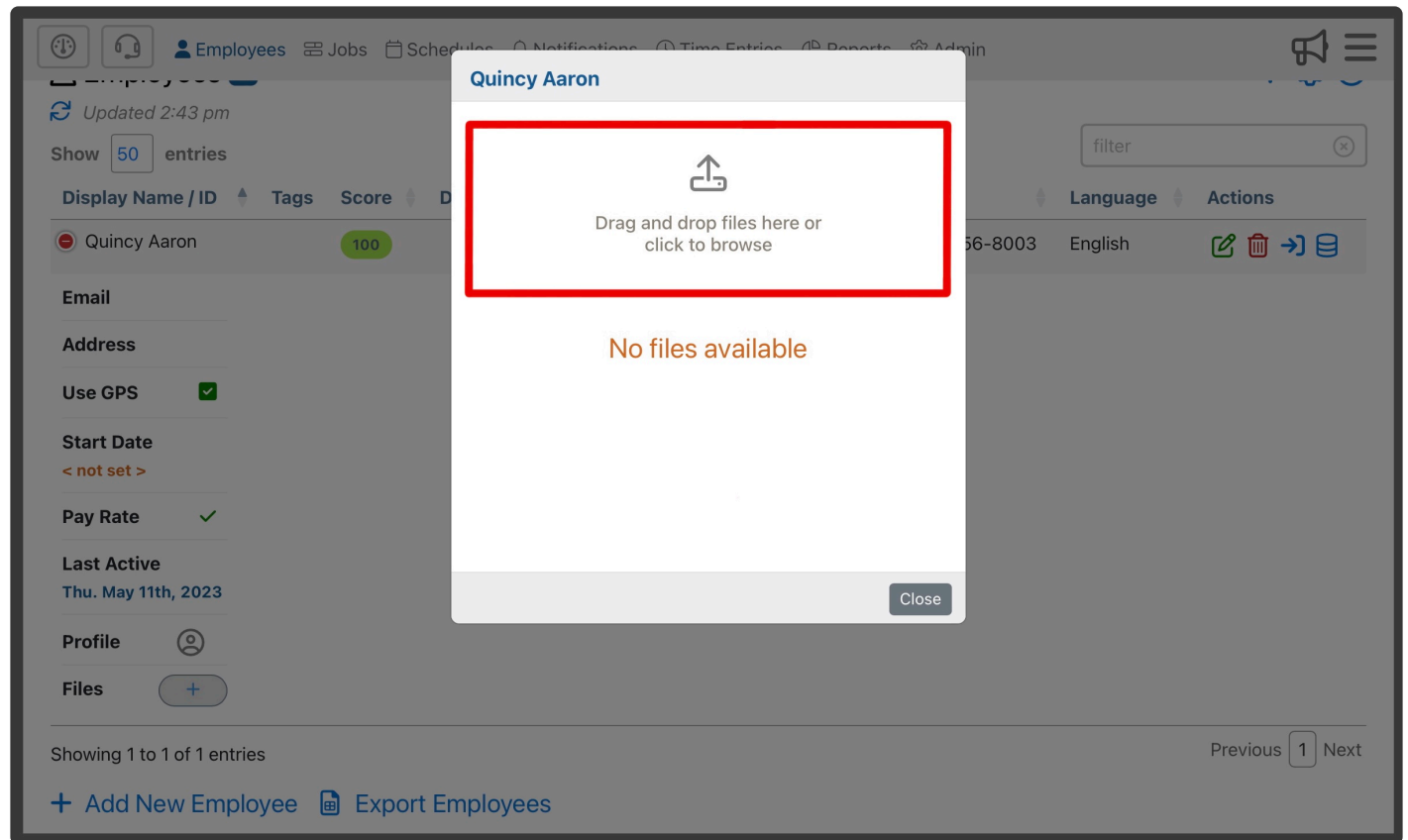
You can upload files (W4, state license, CPR certification, etc.) to an employee's record using the **Files** button in the employee table. If you do not see the Files button, it is because the screen is too small and you will need to expand the entry by clicking on the green plus icon  immediately to the left of the employee name. When you click the Files button, a window will open up that allows for you to upload and edit files for this employee.



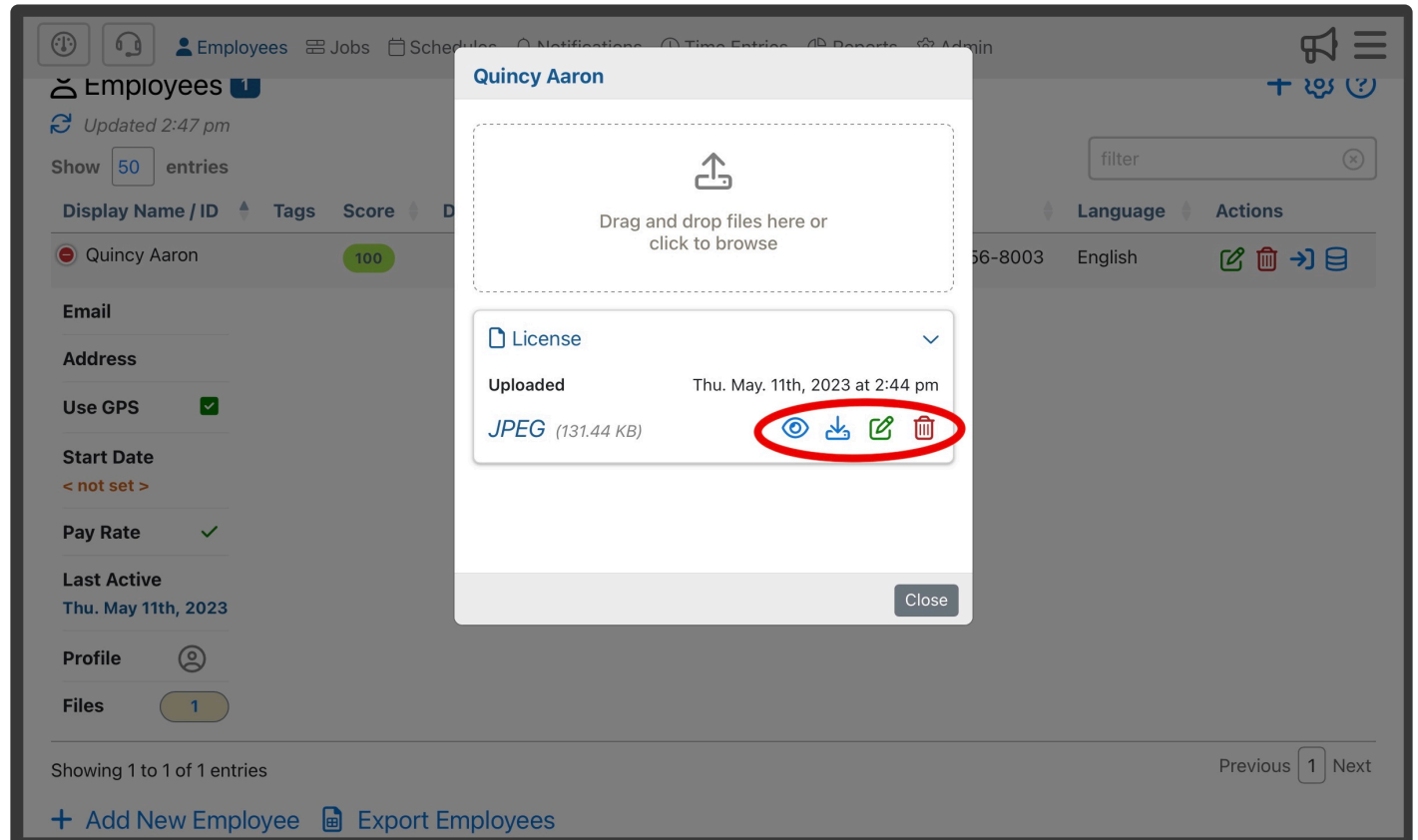
The screenshot displays the 'Employees' management interface. At the top, there's a navigation bar with icons for clock, headset, and menu, followed by tabs: Employees, Jobs, Schedules, Notifications, Time Entries, Reports, and Admin. Below this, the 'Employees' section shows a list of employees. The first employee, Quincy Aaron, is highlighted. To the left of his name is a green plus icon. Below the employee list, there's a sidebar with various fields: Email, Address, Use GPS (checked), Start Date (< not set >), Pay Rate (checked), Last Active (Thu. May 11th, 2023), and Profile. The 'Files' button in the Profile section is circled in red, and a red arrow points to it from the plus icon next to Quincy Aaron's name. The bottom of the interface shows 'Showing 1 to 1 of 1 entries' and pagination controls (Previous, 1, Next).

Display Name / ID	Tags	Score	Details	Supervisor	Linked	Mobile	Language	Actions
Quincy Aaron		100		Quincy Aaron		(612) 356-8003	English	   

To upload a file, just drag and drop or click to open a file explorer window on your device.



Once the file has been uploaded, you can view , download , edit , or delete 





You can set an expiration date on the file during the editing process. This is useful for documents that expire, such as annual licenses or certifications.



The screenshot displays the 'Employees' management interface. On the left, a sidebar shows the employee 'Quincy Aaron' with a score of 100 and a last active date of 'Thu. May 11th, 2023'. The main area shows a modal for editing Quincy Aaron's profile. The modal has a title 'Quincy Aaron' and fields for 'Name' (containing 'License'), 'Expiration' (containing a calendar icon and 'Not Set'), and 'Notes'. The 'Expiration' field is highlighted with a red rectangle. At the bottom of the modal are 'Cancel' and 'Save' buttons. The background shows a table of employees with columns for Name, ID, Tags, Score, and Actions.


Display Name / ID	Tags	Score	D
Quincy Aaron		100	

When a file reaches its expiration date, there will be a red notification in the Employee Table underneath Files.




Employees Jobs Schedules Notifications Time Entries Reports Admin








 Employees 1

ACTIVE INACTIVE ALL

 Updated 2:47 pm

Show entries

Display Name / ID	Tags	Score	Details	Supervisor	Linked	Mobile	Language	Actions
 Quincy Aaron		100		Quincy Aaron		(612) 356-8003	English	   

Email


Address

Use GPS ☒

Start Date
< not set >

Pay Rate ☒

Last Active
Thu. May 11th, 2023

Profile 

Files 1

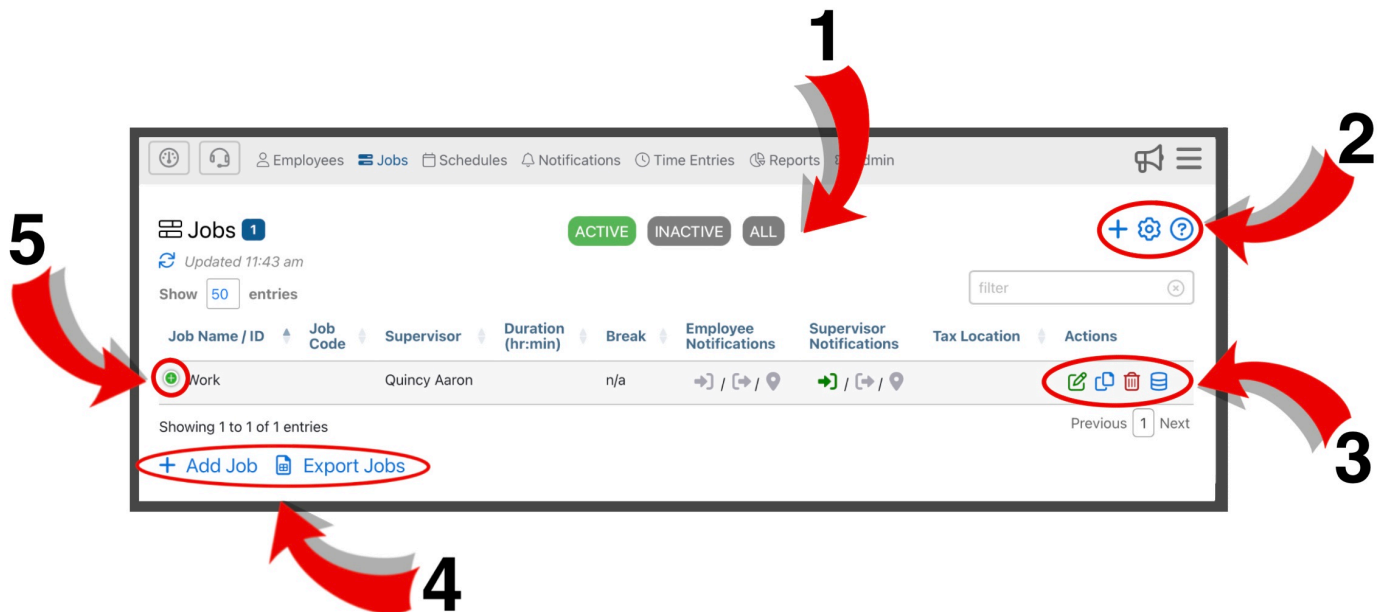
Showing 1 to 1 of 1 entries

Previous 1 Next






3.3. Jobs



Highlights of The Jobs Page



1. Jobs are organized into 3 different categories; Active, Inactive, All. You can filter jobs using these 3 tabs

2. Here you can add a job , adjust settings , and find additional information about the jobs page .

3. Here you can edit , delete , copy jobs , and view audit history 

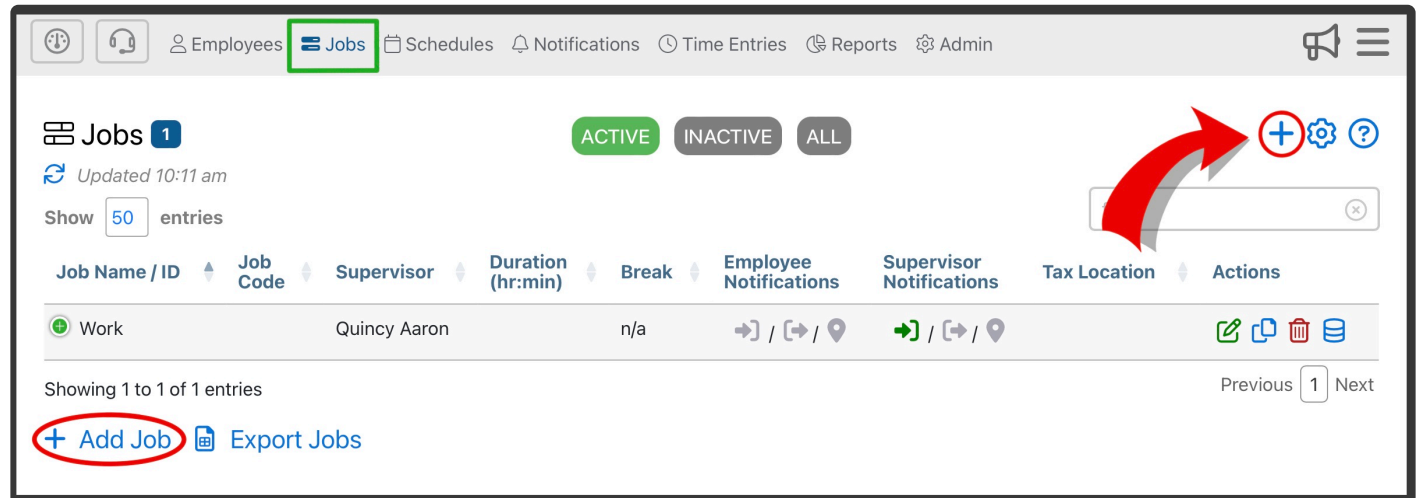
4. Here, you can add a new job. This has the same function as the blue plus sign  in the upper right corner. You can also download job records by clicking  [Export Jobs](#)

5. Here you can expand a job's information by clicking the  icon.



3.3.1. Adding Jobs

You can create a new job by either using the **+** icon in the upper right corner or use the **+ Add New Job** in the lower left corner of the Jobs section of the portal. .



This will bring you to the **Add Job** form where you can enter the Job Name, Job Site Supervisor, Timezone, and other details.


Highlights of This Form:

Job Name

Job Site Supervisor

This field will not be visible unless more than one Supervisor exists. If more than one supervisor exists, then you will be required to assign a supervisor to each job. By assigning a supervisor to each job, you enable the following capabilities:

1. Reports can be filtered based on the job site supervisor. For example, you could filter a report to only show jobs that belong to a particular supervisor.
2. Admin Portal permissions can be enforced based on the job site supervisor. For example, you could restrict a supervisor to only be allowed to view time entries that contain jobs they are assigned to.

 For more information on supervisors, go to the [Supervisors](#) section of the manual.

Timezone

Select the correct time zone for the location of this job.

Address

The address you assign to the job is important for accurate GPS location tracking as well as reporting. You can optionally select a job's location by using a map pin, instead of a street address. The map pin approach

is especially useful for jobs that span a large area. For example, if an employee is assigned to work in specific building of a large multi-building HQ campus, the street address of the HQ building might be far away from the location the employee will clock in from. The map pin can be placed directly on the building where the employee is working, even if that building does not have a unique street address.

✿ Map pin feature is disabled by default. Contact support@telephonetimesheets.com if you would like to have this feature enabled.

Supervisor Group (advanced options)

This field will not be visible unless Supervisor Groups are in use. Supervisor Groups can be created under the Admin —> Supervisors menu. Go to the [Supervisor](#) section of the manual to learn more. By assigning a Supervisor Group to each job, you enable the following capabilities:

1. Reports can be filtered based on the job site supervisor. For example, you could filter a report to only show jobs that belong to a particular supervisor.
2. Admin Portal permissions can be enforced based on the job site supervisor. For example, you could restrict a supervisor to only be allowed to view time entries that contain jobs they are assigned to.

✿ For more information on supervisors, go to the [Supervisors](#) section of the manual.

External ID (advanced options)

The External ID is used for 2 reasons.

1. To assign an ID that is already in use in an external system, such as a payroll system. The External ID can be entered here manually or in some cases the External ID can be synced automatically with a third party system (e.g. ADP).
2. To assign an ID that can be used as an “Employee ID” for clocking-in and out over the phone. This can be useful in cases where your employees are already accustomed to using their employee ID number for clocking-in and out.

Job Site Details (advanced options)

Job Site Details are displayed in the Date/Details column of the time entries screen and you may optionally expose this information to employees in the employee web portal during check in.

Job Details (advanced options)

Job Details are displayed in the Date/Details column of the time entries screen and you may optionally expose this information to employees in the employee web portal during check in.

Notification Profile (advanced options)

The Notification Profile allows you to select what notification rules apply to the job.

e.g. Call the employee if they're 5 minutes late – Text supervisor if employee is 15 minutes late.

* For more information on Notification Profiles, go to the [Notification Profile](#) section of the manual.

Base Employee Pay Rate (advanced options)

This is the default employee pay rate for this job. It will override any base rate in the employee record and can be overridden by entering a specific employee pay rate in the Bill/Pay rate table.

* For more information on employee pay rates, go to the [Including Pay Rate Info In Time Entries](#) section of the manual.

Break Length (advanced options)

Here you can determine the amount of unpaid break time that will systematically be taken out of the total hours worked. These breaks are not controlled by the employee, rather they are scheduled into the job. This means the employee won't initiate their break during their shift.

Auto-apply Break (advanced options)

Here, you can assign the number of hours that must be worked before the unpaid break time is subtracted from the total hours worked. For example, you could assign 4 hours to this field. Then, if an employee works less than 4 hours, no break will be subtracted.

* For more information on automatic unpaid breaks, go to the [Automatic Unpaid Breaks](#) section of the manual.

Budgeted Time for This Job (advanced options)

This field allows you to assign a budgeted time to the job. This is useful for reporting when you want to see how many hours were actually worked, compared to how many hours were budgeted for the job. Once a budgeted time is assigned to a job, you can optionally adjust the number of hours worked to match the number of hours budgeted by clicking on the "Adjust hours worked on time entries to match hours budgeted" checkbox. When this box is checked, the system will adjust the hours worked on any time entries for this job so that they match the hours budgeted, regardless of how long the employee actually works. This is useful for "fixed pay" jobs.

* For more information on Budgeted time for jobs, go to the [Using Time Budgets](#) section of the manual.

Mark Job Active (advanced options)

When a job is marked as Active it will be visible wherever jobs are displayed. If this field is not selected the job will be marked as Inactive. Inactive jobs will be hidden. This field is preselected, but you can toggle this on or off as you please.

Require Photo Check in (advanced options)

When enabled, the employee will be required to submit a photo when they clock in.

Require Photo Checkpoint (advanced options)

When enabled, a photo will be required in order to submit a checkpoint.

Required Photo Check out (advanced options)

When enabled, the employee will be required to submit a photo when they clock out.

Link Job Site to Landline Numbers (advanced options)


As an alternative to Job Codes or Schedule Entries, the system can use the Caller ID from a landline to determine which job to assign when an employee calls into the system.

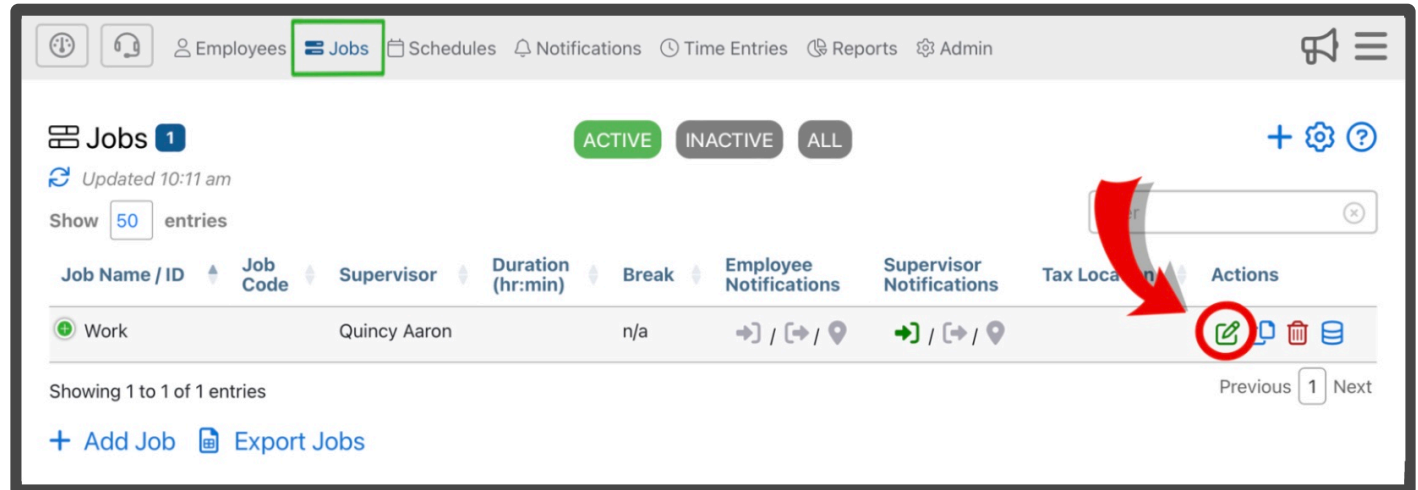


For more detailed information regarding Landline numbers, go to the [Inbound Call Blocking](#) section of the manual.




3.3.2. Editing Jobs

You can edit a job by clicking on the green edit button  in the Actions column for that job. This will bring you to the **Edit Job** form. Here you can modify a jobs details. This will have the same fields as the Add Job form. Go to the [Adding Jobs](#) section of the manual to learn more about the form.



The screenshot displays the 'Jobs' management page. The top navigation bar includes icons for Employees, Jobs (highlighted), Schedules, Notifications, Time Entries, Reports, and Admin. Below the navigation bar, the 'Jobs' section is titled 'Jobs 1' and includes filters for 'ACTIVE', 'INACTIVE', and 'ALL'. A search bar is present on the right. The main table lists job entries. The first entry is 'Work' with supervisor 'Quincy Aaron'. The 'Actions' column for this entry contains a green edit icon (circled in red with a red arrow pointing to it), a plus icon, a trash can icon, and a list icon. The page also shows 'Showing 1 to 1 of 1 entries' and 'Previous 1 Next' navigation links.

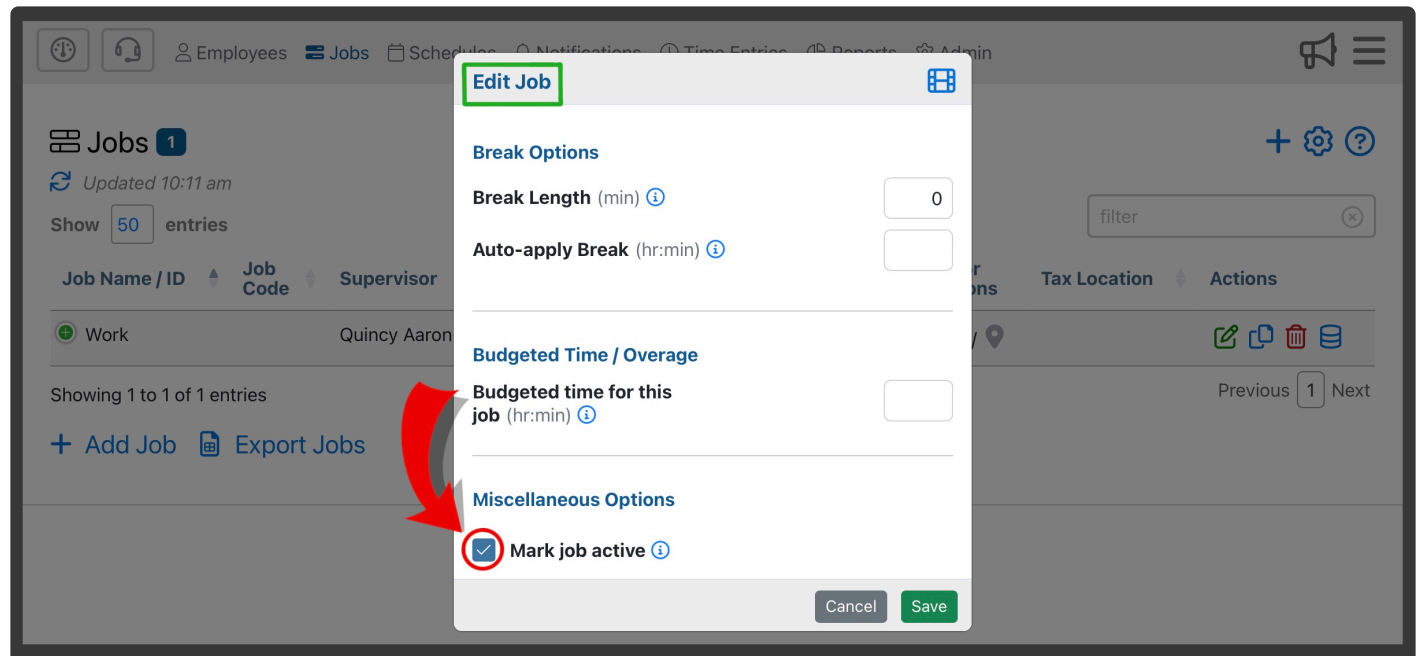
* If you do not see the green Edit button, it is because the screen is too small and you will need to expand that entry by first clicking on the green plus icon  immediately to the left of the entry.

3.3.2.1. Active/Inactive Job Status

If you wish to remove a job from the Admin Portal without permanently deleting the job, you can mark the job as inactive, so it no longer gets displayed in the Admin Portal. This prevents clutter in pull-down menus and other places where jobs are listed. Only active jobs will show up in these places; inactive jobs will be hidden.

Some companies have “never delete” policies for jobs. That way they are available for audits in the future, even though the job may no longer be in use.

To set the job’s active/inactive status, use the checkbox found in the Advanced Options section of the Edit Job form.



* To learn more about where to find the Edit Job form, go to the [Editing Jobs](#) section of the manual.

3.3.2.2. Using Time Budgets

Using Time Budgets allows you to track the hours worked vs the hours budgeted for a job. When utilizing the Time Budget, you are able to set an amount of time (e.g. 5 hours) to a job, and report on overages if they occur. In order to use time budgets, you must setup time budget information for each job using the Edit Job form.

The screenshot shows the 'Edit Job' modal form. The 'Break Options' section includes 'Break Length (min)' set to 0 and 'Auto-apply Break (hr:min)'. The 'Budgeted Time / Overage' section has a field for 'Budgeted time for this job (hr:min)' which is highlighted with a red box and a red arrow. The 'Miscellaneous Options' section has a checked checkbox for 'Mark job active'. The background shows a 'Jobs' list with one entry: 'Work' by Quincy Aaron.

* To turn on this feature, go to Admin —> Settings —> General Settings —> check the box labeled “Track budgeted time overage”.





3.3.2.2.1. Adjusting Hours Based On Budgets


When budgets are assigned to a job, you will be given the option to use rules to adjust the hours worked based on the hours budgeted. If no rules are selected, then no adjustments will be made. However, the budgeted time is still useful for reporting as the reports engine will show both budgeted time for each job, as well as “overages”.


If adjustments are desired, choose from the Budget Adjustment Rule pull-down menu shown here.


Edit Job


Advanced Options 

External ID 


Job Details 


Notification Profile 

Select a Profile 


Base Employee Pay Rate  \$


Break Options


Break Length (min) 

Auto-apply Break (hr:min) 

Budgeted Time / Overage


Budgeted time for this job (hr:min) 


Budget Adjustment Rule 


No Adjustment / Report Only 

[See manual for rule descriptions](#)

Miscellaneous Options

☒ **Mark job active** 

☐ **Require photo check in** 

☐ **Require photo checkpoints** 

Cancel

Save

These rules are designed to adjust the time worked, based on the budgeted time for the job. There are 3 options for making adjustments to the time worked, based on the budgeted time:

1. Always Match – This rule will adjust the time worked to match the budgeted time, regardless of how much time the employee actually worked. This is designed for “flat-rate” jobs that always pay/bill the same regardless of how much time the job actually takes.
2. Always Match Unless Over – This rule will adjust the time worked to match the budgeted time, **unless** the employee worked more than the budgeted time. If the employee worked more than the budgeted time, they will get paid for the actual time they worked. For example, but budgeted time is 6 hours, but the employee worked for 7 hours. Since they were over, they will get paid for exactly what they worked (7 hours in this case).
3. Always Match Unless Over/Tardy – This is a custom rule that works just like the previous rule, but also factors in tardiness penalties in some cases.

Here are the full details on this custom rule, using a budgeted time of 6 hours:

Employee works the budgeted time or over:

If an employee works the full 6-hour budget or more, they will be paid for the exact hours they were clocked in, without any adjustments, even if they were late in starting.

Employee works less than the budgeted time:

If the employee works less than the 6-hour budget:

If they arrive on time, their hours worked will match the budget.

If they clock in late, their hours worked will be adjusted to the greater of these two values:


1. The budgeted time minus the tardy duration (budget-tardy)
2. The actual time they worked.

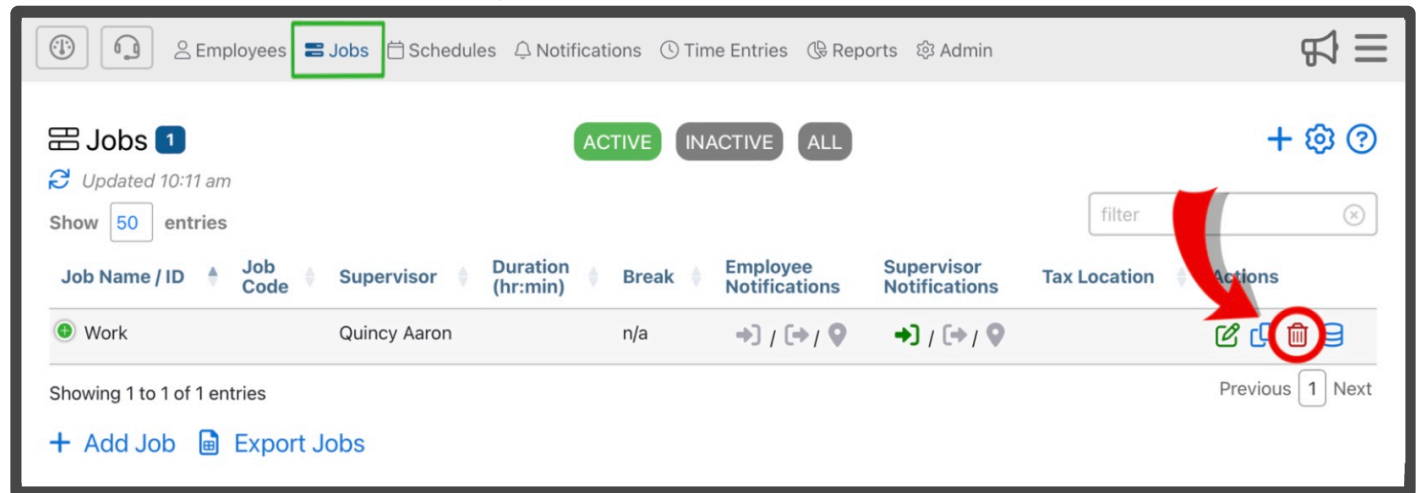
For instance, if the job has a 6-hour budget, and an employee works for 5 hours and 55 minutes but was 15 minutes late, the budget-tardy time is 5 hours and 45 minutes, but since the employee worked for 5 hours and 55 minutes, their hours worked will be adjusted to the actual time worked (5 hours and 55 minutes). However, if the employee only worked for 4 hours, their hours worked would be adjusted to the budget-tardy value, which in this case is 5 hours and 45 minutes.

✿ To learn more about time budgets, go to the [Using Time Budgets](#) section of the manual.




3.3.3. Deleting Jobs

To manually delete a Job, click on the red delete button  in the Action column for that Job's entry in the table. Some companies have “never delete” policies for jobs. That way they are available for audits in the future, even though the job may no longer be in use. If you wish to remove a job from the Admin Portal without permanently deleting the job, you can mark the job as inactive under Advanced Options. For more information on active/inactive status, go to the [Active/Inactive Job Status](#) of the manual.



The screenshot displays the 'Jobs' management interface. At the top, the 'Jobs' tab is selected in the navigation menu. Below the navigation bar, there are filters for 'ACTIVE', 'INACTIVE', and 'ALL'. A search bar with the text 'filter' is present. The main table lists job entries. The first entry is 'Work' with supervisor 'Quincy Aaron'. The 'Actions' column for this entry contains three icons: a green plus icon, a blue edit icon, and a red trash icon. A red arrow points to the red trash icon, which is circled in red. The page also shows 'Showing 1 to 1 of 1 entries' and 'Previous 1 Next' pagination controls.

✿ If you do not see the red delete button, it is because the screen is too small and you will need to expand that Job's entry by first clicking on the green plus icon  immediately to the left of the Job's description.



3.3.4. Breaks

Telephone Timesheets supports two types of breaks:

1. Automatic unpaid breaks. These are breaks that are automatically created by the system according to job-specific settings. For example, you can configure system-initiated break rules for a job so that if an employee works at least 4 hours, the system will automatically deduct a 15-minute unpaid break from their time worked.

2. Employee-initiated unpaid breaks. These are breaks that get started and ended by the employee. For these breaks, rules can be configured to ensure that employees comply with break rules such as California meal break rules.

Employees can start and end unpaid breaks through the following methods:

- Click the Start Break or End Break buttons on the employee web portal
- Text the letter 'b' to your toll-free clock in number
- Call the toll-free clock-in number and press 1 when prompted



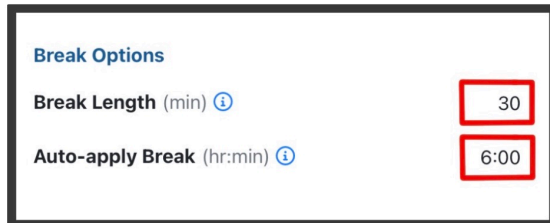
To turn on this feature, go to Admin —> Settings —> General Settings —> check the box labeled “Enable IVR and SMS breaks.”



3.3.4.1. Automatic Unpaid Breaks

Unpaid breaks can be automatically subtracted from the hours worked for a job. There are two settings to configure in the job edit form.

1. Break Length
2. Auto-Apply Break Interval



Break Options	
Break Length (min) ⓘ	30
Auto-apply Break (hr:min) ⓘ	6:00

In the example above, the system will automatically deduct a 30-minute unpaid break for every 6 hours the employee works. For example, If the employee works 12 hours, they will have two 30-minute breaks deducted for a total of 1 hour of unpaid break time.



3.3.4.2. Employee-Initiated Unpaid Breaks

Employees-initiated unpaid breaks get started and ended by the employee. For these breaks, rules can be configured to ensure that employees comply with break rules such as California meal break rules.

Employees can start and end unpaid breaks through the following methods:

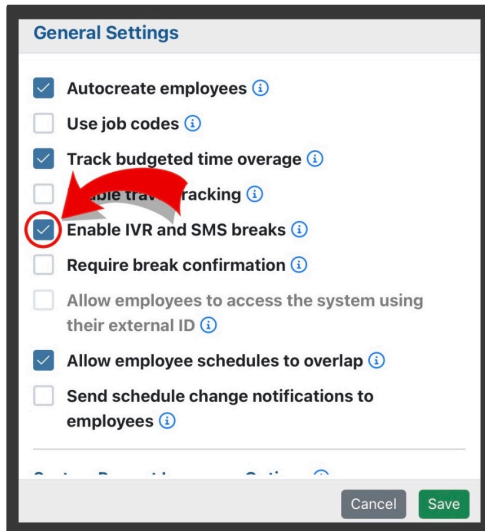
- Click the Start Break or End Break buttons on the employee web portal
- Text the letter 'b' to your toll-free clock in number
- Call the toll-free clock-in number and press 1 when prompted

 To turn on this feature, go to Admin —> Settings —> General Settings —> check the box labeled “Enable IVR and SMS breaks.”



3.3.4.2.1. Enable Breaks By Calls & Texts

By default, the only way for an employee to initiate a break is through the employee web portal. If you would like to enable employees to start and end breaks through phone calls and text messages you can enable this feature by navigating to Admin —> Settings —> General Settings —> check the box labeled “Enable IVR and SMS breaks.”



When enabled, employees will be able to initiate breaks by texting the letter “b” to your toll-free clock in number, or by calling the toll-free clock-in number and press 1 when prompted.



3.3.4.2.2. Employee Reminder: Start Break

This break feature is hidden. When hidden, this feature will not be usable. Contact support@telephonetimesheets to enable this feature. If enabled, employees will get a reminder text once they have been clocked in to a job for a certain amount of time. This feature is used to improve compliance with break start time rules. If it is enabled, your employees will get a reminder text once they have been clocked in to a job for a certain amount of time. The amount of time (in hours and minutes) can be configured by Telephone Timesheets support staff.

For example, if the law requires an employee to start their lunch break before the beginning of the 5th hour of work, then you could enable Break Start Reminders with a time of 4 hours and 45 minutes (4:45), the system will then send a text message any employee who has worked for 4 hours and 45 minutes and has not yet started their break. The text message looks like this:

**Break Reminder: You started
your break at 03:20PM CDT**

This reminds employees that they should start their break and lets them know they can reply with the letter 'b' in order to start their break. This helps to ensure that employees are starting their breaks before the 5th hour of work, which avoids a potential break violation.



3.3.4.2.3. Employee Reminder: End Break

This break feature is hidden. When hidden, this feature will not be usable. Contact support@telephonetimesheets to enable this feature. If enabled, employees will get a reminder text once they have been on break for a certain amount of time. This feature is used to improve compliance with break length rules. If it is enabled, your employees will get a reminder text once they have been on break for a certain amount of time. The amount of time can be configured by Telephone Timesheets support staff.

If Break End Reminders are enabled with a time of 30 minutes, then, as soon as the employee has been on break for 30 minutes, the system will send a text message to the employee reminding them of when they started their break.

Break Reminder: You started
your break at 03:20PM CDT

Over time, employees get used to waiting for the text and this greatly reduces occurrences of early return from break (which are considered labor violations in some states).



3.3.4.2.4. Break Violations Reporting

This feature highlights issues with breaks so they can be addressed with employees. This is important in states like California where there are strict laws to ensure that employees are allowed to take breaks of the right duration and within a reasonable time.

Here are some examples:












- Employee must be allowed an uninterrupted meal break of at least 30 minutes.
- Meal break must begin before the end of the 5th hour of work (i.e. must be started by the time the employee has worked 4 hours and 59 minutes).
- 2nd meal break must begin before the end of the 10th hour of work.

For example, when an employee is required to take a 30-minute uninterrupted lunch break for any shifts that are 5 hours or more. Breaks that are too short (less than 30 minutes in this example) or start too late (after the 5th hour) will be highlighted in reports.

Break violations will be highlighted in red in any reports that include Time Entry detail rows (e.g. Time Entries Report, Employee Summary Report, etc.)

Time Entries Detail													
Employee First	Employee Last	Job Description	Shift	Job Date	DOW	Hours	Break	Rate	Amount	Start Time	End Time	Checkpoints	Report / Open Entry
Quincy	Aaron	Work	Anytime	2023-05-26	Fri	1:00		\$20.00	\$20.00	05-26 10:00 AM CDT	05-26 11:00 AM CDT		
Quincy	Aaron	Work	Anytime	2023-05-25	Thu	5:07		\$20.00	\$102.40	05-25 10:01 AM CDT	05-25 03:08 PM CDT		

In addition, this would trigger a break violation highlight in the Time Entries screen.

First	Last	Job	Date	In - Out	Breaks	Hours	Actions
Quincy	Aaron	UNSCHEDULED Time Entries	2023-06-01 Thu	06/01 9:12 am - 06/01 1:26 pm CDT	10	04:04	   
Quincy	Aaron	UNSCHEDULED Work	2023-05-30 Tue	05/30 8:33 am - 05/30 1:00 pm CDT	+	04:27	  
Quincy	Aaron	UNSCHEDULED Work	2023-05-28 Sun	05/28 11:15 am - 05/28 6:15 pm CDT	53	06:07	   



Contact Telephone Timesheets support to have break rules enabled and configured

according to your requirements.

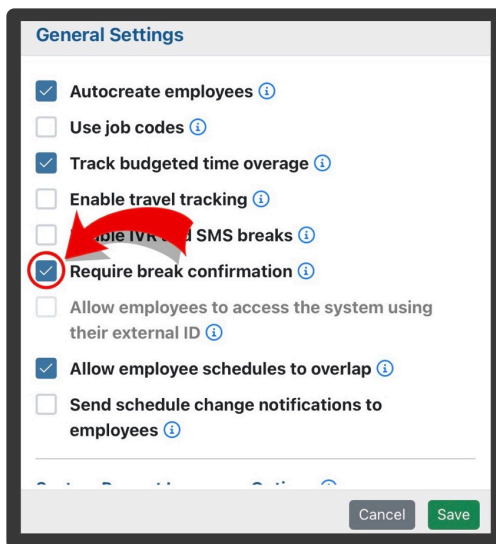


3.3.4.2.5. Employee Break Confirmations

Break confirmations allow employees to confirm that they were given the opportunity to take all of the breaks that they are entitled to.

Some states like California have strict laws to ensure that employees are allowed to take breaks. If employees are not allowed to take breaks, there can be significant legal and financial penalties for the employer. To protect employees and employers, the system supports break confirmations.

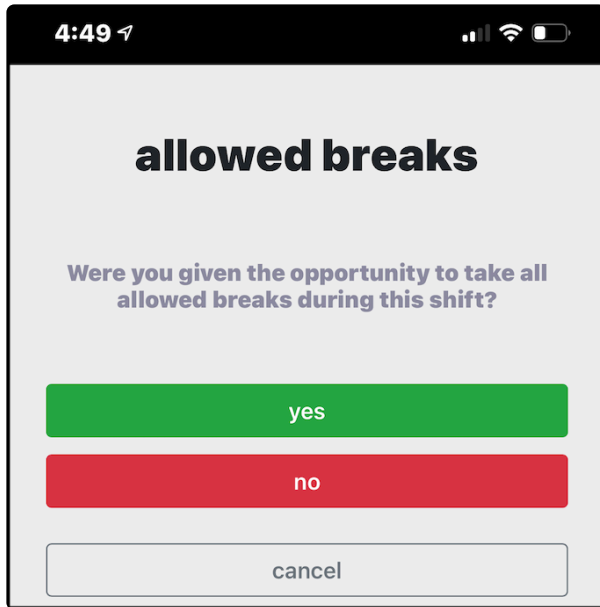
Break confirmations are enabled by going to Admin —> Account —> Configure Account Defaults, and clicking the “Require break confirmation” check box as shown here.



Here's how it works:

When this feature is enabled, employees will be asked to confirm that they were given the opportunity to take all allowed breaks for their shift.

In the employee web portal it looks like this:



4:49

allowed breaks


Were you given the opportunity to take all allowed breaks during this shift?

yes

no

cancel

If the employee dials in, they will hear [Press 1 to confirm that you were given the opportunity to take all lunch and rest breaks, press 2 if you were not.](#)

If the employees does NOT press 1 to confirm, an email notification with the subject “BREAK NOT OFFERED” will be sent to the any email addresses configured in the Notification Profile for the job OR the default supervisor email if Notification Profiles are not used or do not have any email addresses configured. In addition, the time entry will be highlighted with  (indicated Break Denied) in the Details In/Out column.



3.3.4.2.6. Employee Warning: Short Break

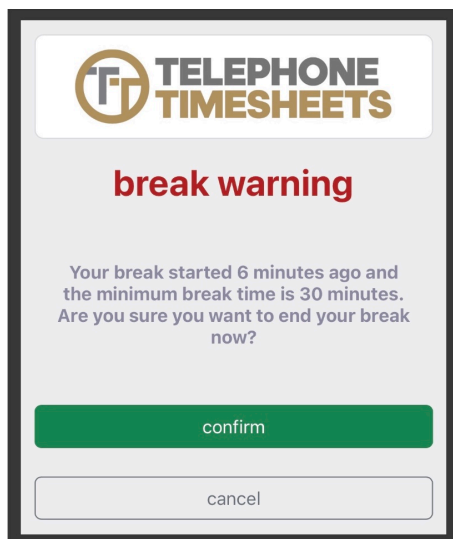
This break feature is hidden. When hidden, this feature will not be usable. Contact support@telephonetimesheets to enable this feature. If enabled, employees will receive a text message warning them they are ending their break too soon. Short break employee warnings will help reduce violations due to employees ending their breaks before the required minimum duration. The minimum break duration (in hours and minutes) can be configured by Telephone Timesheets support staff.

This feature is useful in states like California that have strict laws to ensure that employees are allowed to take breaks of a certain length. For example, they might be required to take a 30-minute lunch break if they have worked 5 hours or more. If employees don't stay on break for the full time (30-minutes in this example), there can be significant legal and financial penalties. To protect employees and employers, the system supports short break employee warnings.

For example, if short break warnings are enabled with a time of 30 minutes, and an employee attempts to end their break at 28 minutes, they will have one of the following experiences:

- For employee web portal users:

When the employee clicks on the End Break button, they will see a warning message as shown below.



- For text-in breaks (assuming [text-in breaks](#) are enabled):

When an employee is on break and texts the letter 'b' to end their break, they will receive this text message. "Warning! Your break of 11 minutes for job [Job Name] does not meet the minimum break time of 30 minutes. Text the letter b one more time to end this break." This will give the employee the opportunity to text again to once they have completed the full 30 minute break. Otherwise, they can continue on a will be allowed to end their break early, but the warning will be recorded in their time entry details.



Your break of 0 minutes for job
[Work] is now complete at
04:27PM CDT

- For call-in employees (assuming [call-in breaks](#) are enabled):

When an employee is on a break and calls in, the first thing they will hear is “Warning! You are currently on break but have not completed the minimum break time for job [Job Name].” This will give the employee the opportunity to hang up and call back later when they have completed the full 30 minute break. Otherwise, they can continue on and will be allowed to end their break early, but the warning will be recorded in their time entry details.

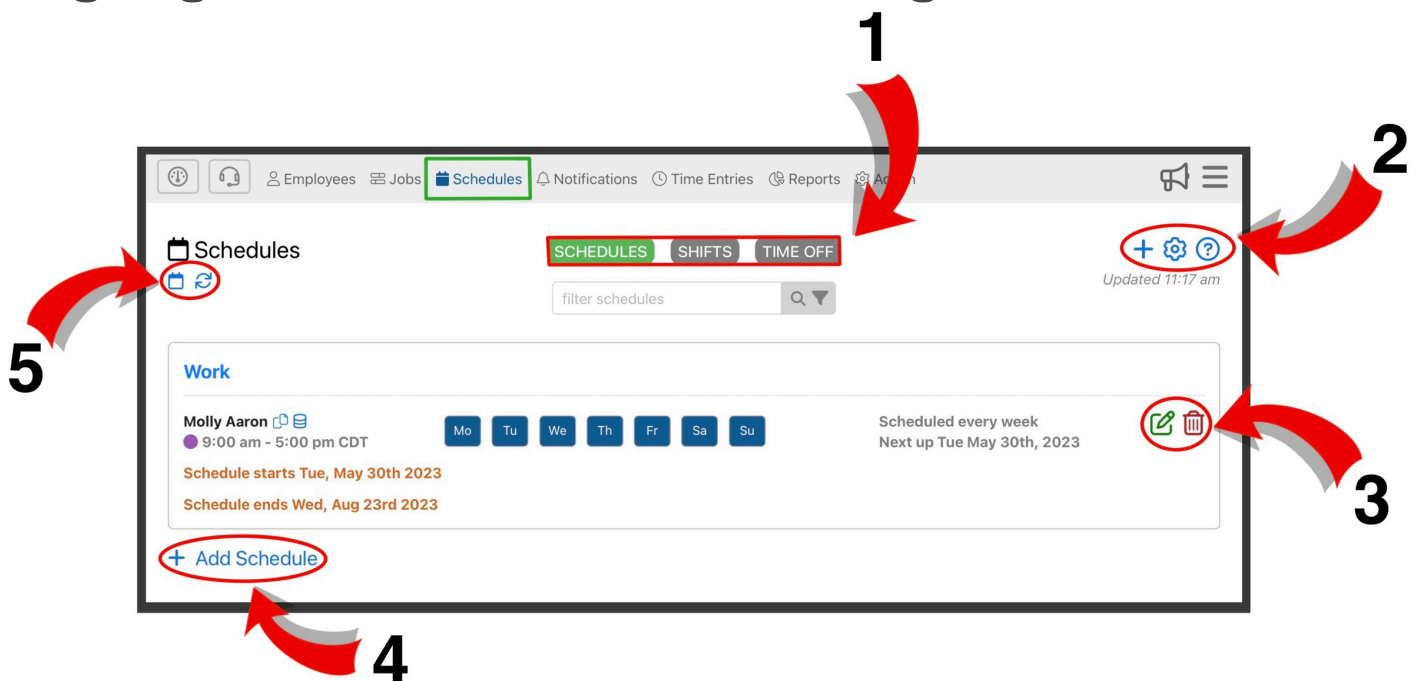


3.4. Schedules

Telephone Timesheets supports one-time and recurring schedules. Recurring schedules can be recurring weekly schedules, or they can be any recurring pattern such as, monthly, yearly, etc. Telephone Timesheets uses standards-based calendar rules, so integration with third-party calendars can be accomplished.




Schedule entries are not required; however, a schedule is useful for things like enforcing timely clock ins/outs by using the call/text/email notifications feature of the system.


Highlights of The Schedules Page






1. There are 3 sections to the Schedules page:

- Schedules is where recurring and one-time schedules are created and edited. To learn more about creating schedules, go to the [Adding Schedules](#) section of the manual.
- Shifts is where individual shifts can be created and edited. To learn more about editing individual shifts, go to the [Editing An Individual Shift](#) section of the manual.
- Time Off is where is where time off entries are created and approval status is determined. Time off entries are organized into 3 categories, Approved, Denied, and Pending. To learn more about time off entries, go to the [Time Off Tracking](#) section of the manual.

2. Here you can add a schedule , adjust settings , and find additional information for each tab . Settings and the additional information for each tab in the Schedules section of the Admin Portal will vary from tab-to-tab.

3. Here you can edit  and delete  schedule entries.

4. Here, you can add a new schedule. This has the same function as the blue plus sign  in the upper right corner.

5. Here you can select to view your schedules on a day-by-day basis by clicking the . You can also refresh the page by clicking the .



3.4.1. Adding Schedules

When creating a series, there are two primary decisions to make:

1. Who will get scheduled:

- Individual Employee: In this case, every day in the schedule entry will have just one known employee. e.g. John Smith, Monday-Friday.
- Multiple Employees: In this case, each day in the schedule entry can be unique. e.g. John Smith and Frank Jones Monday & Tuesday, but Sally Johnson on Friday.
- Any Employee: In this case, every day in the schedule entry will have the special “Any Employee” with a count. e.g. Any Employee with count of 3, Monday-Friday. In this case, the system does not know who will work, but it does know that 3 people must clock in.

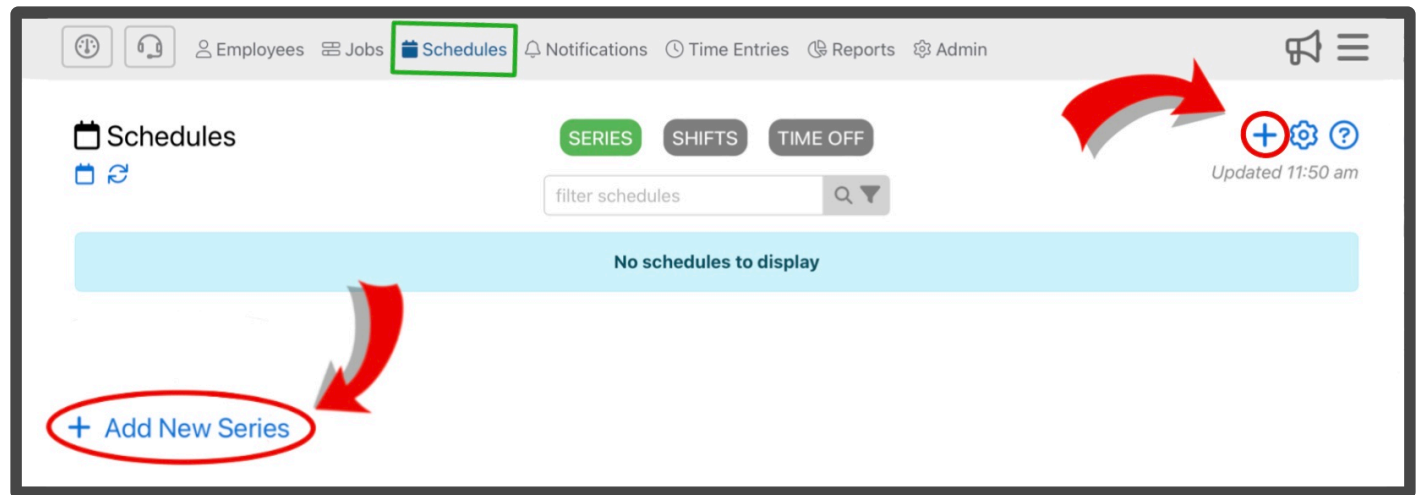
2. The frequency of the schedule:

- Recurring schedules: For example, every Friday from 8pm to 11pm, or every 3rd Wednesday of the month from 2pm to midnight. Any type of recurrence is supported.
- One-time schedules: For example, November 26th from 5pm to 9pm.

These schedules can be viewed in two ways:

1. Series View: This allows you to see the rules that were used to create a one-time or recurring series of shifts.
2. Shift View: This allows you to see a weekly calendar view of each shift for a particular job. You can use the Shift View to modify an individual shift.

You can create a new series by either using the **+** icon in the upper right corner or use the **+** [Add New Job](#) in the lower left corner of the Schedules section of the portal.



This will bring you to the New Schedule edit screen where you can enter the employee(s), job, and days of the week, start date, end date, etc.

Highlights of This Form:

Schedule is Enabled/Disabled

This function makes the schedule either active or inactive. Marking a schedule as disabled makes it so employees can no longer check in to the scheduled job. However, if a schedule is marked as disabled, it won't remove it from the Series or Shifts view in the Schedule section of the Admin portal.

Schedule Type

This is where you determine whether you will schedule an Individual, Multiple, or Any employee(s). This field will change how you schedule the series.

Job

This is where you select the job that you are scheduling. You must create a job before you start the scheduling process.

Mark Schedule as Pending

The option to mark a schedule as pending is disabled by default, but can be turned on by contacting support@telephonetimesheets.com. If enabled, you can mark a schedule as pending. This will create a new tab for pending schedules. If a schedule is pending, it will be considered inactive. The pending feature can be used to create schedules that have yet to be assigned to an employee. This is most often used with companies that supply employees through a vendor. This allows the company to create the schedule before an employee has been assigned. Once an employee has been assigned, that schedule can be approved and no longer be pending.

✿ This is most often used with the Any Employee(s) schedule types because this schedule type is used for employees who are supplied by vendors.

Schedule Any Time of Day

This can be used if you are creating a schedule where the start and end time isn't important to the job. By checking this box you can no longer select a start and end time to the shift.



This feature should be avoided unless the job can truly be done anytime from midnight to midnight. You should try to put a start and end time even if there is no concrete start and end to the shift. If an employee clocks in within 5 hours of their shift, it will match with the scheduled job.

e.g. an employee is scheduled from 10am-2pm, but clocks in anytime between 5am-7pm will be consider a match to the scheduled shift.

Start/End Time

Here you can select the start and end time of your shift. The start and end time of the shift must be consistent for every assigned work day for this schedule. However, you can edit individual shift start and end times.



For more information on editing a signal shifts start and end time, go to the [Editing An Individual Shift](#) section of the manual

Repeat/One Time

You can select if this schedule is either recurring or completed one time. If the job is reoccurring, you can select how often it will reoccur.

e.g. Weekly – Every 3 Weeks – Monthly – Yearly

Scheduling

This section of the form will function differently depending on what schedule type you selected; Individual, Multiple, or Any Employee(s). It's important to note that the start and end time cannot change per day when creating a series

- Individual Employee: The Individual Employee schedule type is for cases where there is a single known employee who will work each scheduled day.
e.g. John Smith, Monday, Wednesday, and Friday
- Multiple Employees: The Multiple Employees schedule type is for cases where more than one employee will work each scheduled day, e.g. John Smith and Sally Jones work Monday, Wednesday, and Friday. This schschedule type is also used when there are different employees for each scheduled day. e.g. John Smith and Frank Jones Monday & Tuesday, but Sally Johnson on Friday. By using the Multiple Employees schedule type, it is possible to have a single schedule entry, rather than multiple Individual Employee schedule entries.
- Any Employee(s): The Any Employee schedule type is for cases where the employee who will do the job is unknown. For example, if the employee is provided by a 3rd-party vendor, when the specific employee will be assigned at a later date.

Start/End Date

Here you can select your start and end date for this scheduled job. You can select 3 different ways to end a schedule:

1. Never: This allows the schedule to run infinitely.
2. End Date: The last day of this schedule can be chosen using a calendar selector. For example, the last day of the schedule is October 3rd, 2024.
3. Count Reached: In this case, the schedule ends after a certain number of occurrences. For example, a daily schedule with a count of 5 would end after 5 days. A weekly schedule with a count of 5 would end after 5 weeks.

Highlight Color (advanced options)

A specific color can be assigned to this schedule to differentiate it in the Shifts view.

Schedule Details (advanced options)

Schedule Details are displayed in the Date/Details column of the time entries screen and may optionally be exposed to employees in the employee web portal during clock in.

Notes For Scheduler (advanced options)

Employees will not see these notes. They are only available in the admin portal to those who maintain the schedule.

Break Length (advanced options)

Here you can determine the amount of unpaid break time that will automatically be subtracted from the total hours worked. These breaks are not controlled by the employee. This means the employee won't start and end their break during this shift. The Break Length entered here overrides any Break Length assigned to the Job.

Auto-apply Break (advanced options)

Here, you can assign the number of hours that must be worked before the unpaid break time is subtracted from the total hours worked. For example, you could assign 4 hours to this field. Then, if an employee works less than 4 hours, no break will be subtracted. The Auto-apply Break entered here overrides any Auto-apply Break assigned to the Job.



For more information on automatic unpaid breaks, go to the [Automatic Unpaid Breaks](#) section of the manual.

Budgeted Time for This Shift (advanced options)

This field allows you to assign a budgeted time to the shift. This is useful for reporting when you want to see how many hours were actually worked, compared to how many hours were budgeted for the shift. The value entered here will override any budgeted time assigned to the Job.



For more information on Budgeted time for jobs, go to the [Using Time Budgets](#) section of the manual.

Schedule Snapshot (advanced options)


Here, you can visualize how your schedule will look once it has been saved. You can check this field to ensure the schedule was entered correctly.

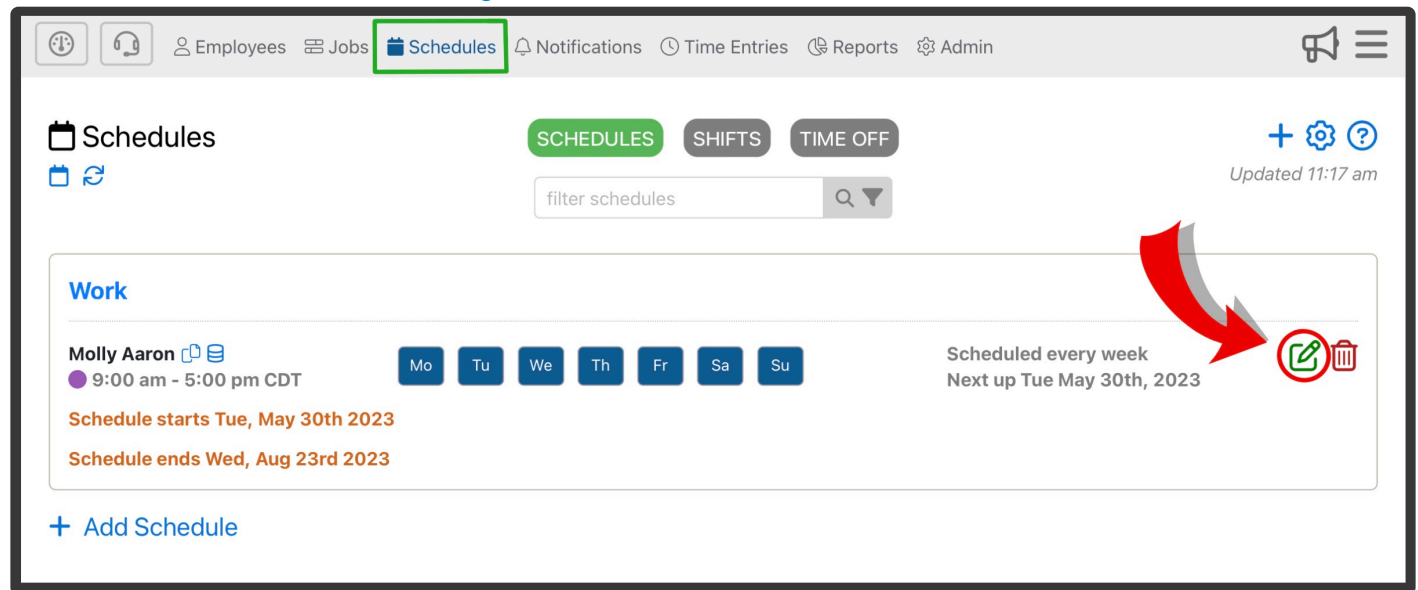
Hide Past Schedule Dates (advanced options)

When looking at your Schedule Snapshot, you can hide scheduled dates that have already passed.



3.4.2. Editing Schedules

To edit a schedule entry, you must first navigate to the Schedule tab at the top of the page. From there, you can edit any schedule information by clicking on the green edit button . This will bring you to the **Edit Schedule** form. Here you can make any modifications to the schedule. This will have the same fields as the Add Schedule form. Go to the [Adding Schedules](#) section of the manual to learn more about the form.



The screenshot displays the 'Schedules' management interface. At the top, a navigation bar includes icons for a clock, headset, and menu, followed by links for 'Employees', 'Jobs', 'Schedules' (highlighted with a green box), 'Notifications', 'Time Entries', 'Reports', and 'Admin'. Below this, the 'Schedules' section features tabs for 'SCHEDULES' (active), 'SHIFTS', and 'TIME OFF'. A search bar labeled 'filter schedules' and a 'Updated 11:17 am' timestamp are also present. The main content area, titled 'Work', shows a schedule for 'Molly Aaron' with a 9:00 am - 5:00 pm CDT shift. The schedule is active on Monday and Tuesday, with a weekly recurrence pattern. A red arrow points to a green edit icon (a pencil inside a circle) located next to the schedule details. Below the schedule information, there is a '+ Add Schedule' button.







3.4.2.1. Multi-Day Jobs

This scheduling feature is hidden. When hidden, this feature will not be usable. Contact support@telephonetimesheets to enable this feature. If enabled, you will be able to schedule a Multi-Day job. Multi-Day jobs are jobs that can be completed at any time over the course of two or more consecutive days. For example, a job that needs to be completed anytime after 5PM on Friday, but before 9AM on Sunday.

To make a job a Multi-Day Job, select the checkbox for Multi-Day Job in the Advanced Options section of the Job edit form.

Miscellaneous Options

- ☒ **Enable Multi-Day Job** 
- ☐ **Require photo check in** 
- ☐ **Require photo checkpoints** 
- ☐ **Require photo check out** 

Then, in Schedule, select multiple consecutive days. For example, if Friday, Saturday, and Sunday are selected, the job can be completed on any of those days. If enabled, notifications for late Check-In won't be sent until the end time on the final scheduled day of the job. You'll notice the highlighted days are orange instead of blue- if they're not orange, you'll need to make sure that the box for Multi-Day Job was checked in the Job entry.

New Schedule**Repeat**

Weekly

every

1

week(s)

On

Fr or Sa or Su

Mo

Tu

We

Th

Fr

Sa

Su

You are scheduling a multi-day job so please ensure you only select consecutive days.

Start Date[clear](#)

Fri Mar 20th, 2020

End On


Never

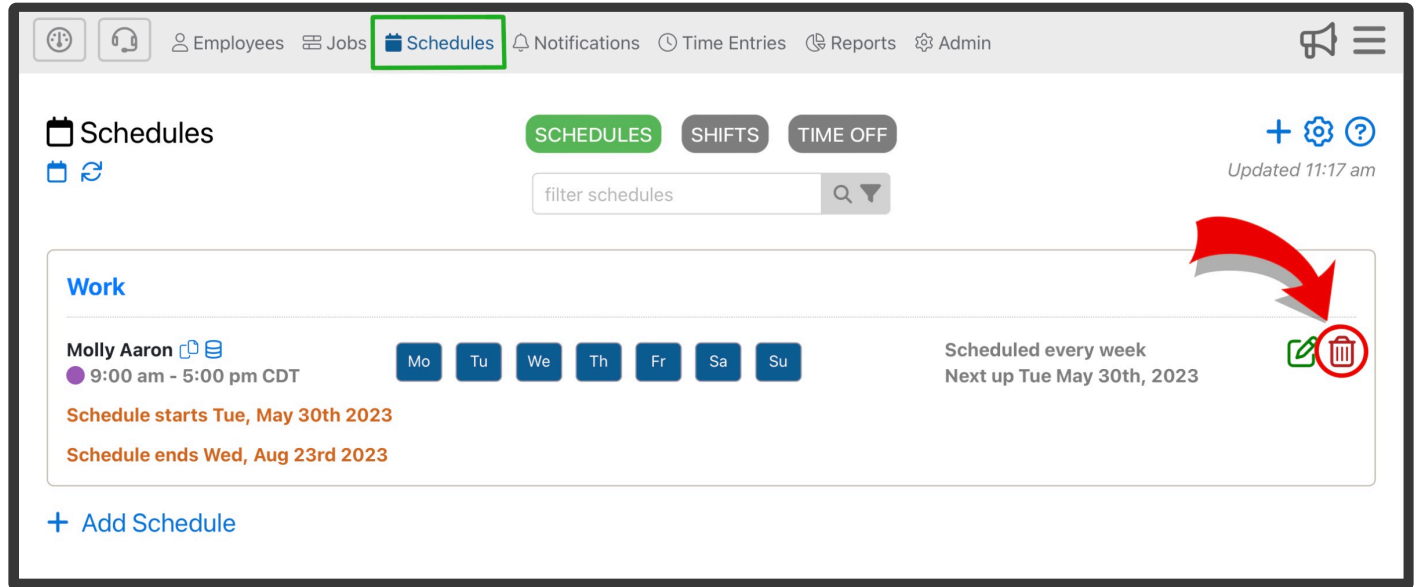
Cancel

Save



3.4.3. Deleting Schedules

To manually delete a Schedule entry, click on the red Delete button  in the Action column for that Schedule entry in the table.



The screenshot shows the 'Schedules' page in the Telephone Timesheets application. The top navigation bar includes icons for a clock, headset, and menu, followed by links for 'Employees', 'Jobs', 'Schedules' (highlighted with a green box), 'Notifications', 'Time Entries', 'Reports', and 'Admin'. Below the navigation bar, the 'Schedules' section is displayed with tabs for 'SCHEDULES' (active), 'SHIFTS', and 'TIME OFF'. A search bar labeled 'filter schedules' is present. The main content area shows a schedule for 'Molly Aaron' with a 9:00 am - 5:00 pm CDT shift. The schedule is active, indicated by a green checkmark. A red arrow points to the red trash icon in the action column, which is used to delete the schedule. The schedule details include 'Scheduled every week', 'Next up Tue May 30th, 2023', and dates for when the schedule starts and ends. A '+ Add Schedule' button is at the bottom left.

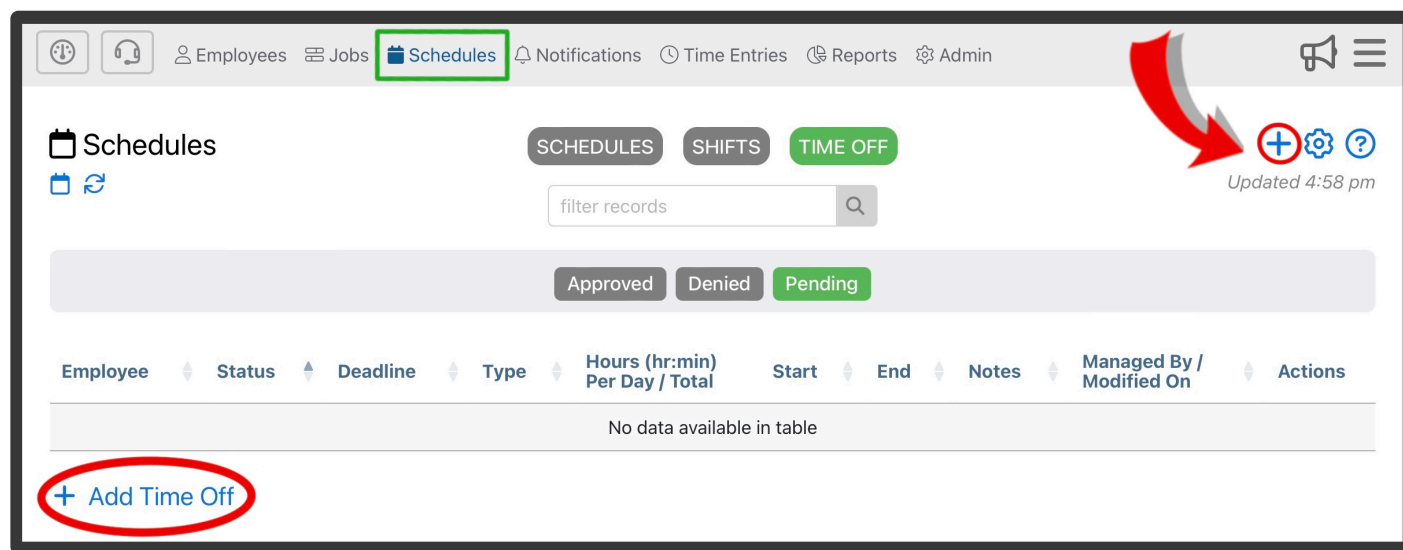


3.4.4. Time Off Tracking

Time off entries are used to stop the system from calling/texting/emailing employees and supervisors on days employees have taken time off from their normal schedule due to vacations, sick days, holidays, etc. For both paid and unpaid time off, employees notifications are suspended to avoid bothering employees. Time Off entries are organized into 3 categories, Approved, Denied, and Pending.

Time Off entries can be created 2 different ways:

1. Requested by the employee through the employee web portal. When an employee submits a Time Off entry It will be labeled as pending. Any pending Time Off entries will need to be approved or denied. Employees are notified whether their request was approved or denied.
2. Created in the Admin portal. This can be done by clicking the **+** icon in the upper right corner or use the **+ Add Time Off** in the lower left corner of the Time Off section of Schedules.



This will bring you to the **Add Time Off Entry** form where you can enter the employee, start and end dates, as well as hours-per-day (if paid time off).

Highlights of This Form:

Employees

In this field, Select the employee that is requesting time off.

Start/End Date

In this field, select the start and end date for the Time Off entry. To create a Time Off entry that spans one day, select the same start and end date.

Time Off Type

You can either select Unpaid or Paid time off. There are 4 types of paid time off; Personal, Sick Time,

Holiday, Bereavement. These paid time off types will be tracked and tallied in payroll reports. When integrating Telephone Timesheets with a 3rd party payroll system like ADP, you can map Telephone Timesheets 4 types of paid time off to their corresponding time off types in the 3rd party payroll system. e.g. "Sick Time" in Telephone Timesheets may correspond to "Sick" in ADP

Approval Status

This is where a Time Off entry status is labeled as Approved, Denied, or Pending. All Time Off entries are organized by their approval status. If a Time Off entry is pending, there will be a notification on the top left of the Admin Portal.

Admin Notes

Employees will not see these notes. They are only available in the admin portal to those who maintain Time Off entries.

External ID (advanced options)

To assign an ID that is already in use in an external system, such as a payroll system. The External ID can be entered here manually or in some cases the External ID can be synced automatically with a third party system (e.g. ADP).

Show time off entry on shift view (advanced options)

In order to facilitate the time off workflow, all Time Off entries will be added to the top of the Shift View calendar to indicate which days the employee is off. If you would rather not see them, you can uncheck this box. If shift view display is enabled, the system will show any employee who is assigned to shifts that conflict with their Time Off entries. As seen here, the Time Off entry will be red to indicate a scheduling conflict. This enables a visual workflow for administrators who need to re-assign shifts for employees who have requested days off. Once all of the employee's shifts for the day have been re-assigned, the red highlight will clear, indicating that the request for this day has been fully processed.

Telephone Timesheets Schedules

SCHEDULES SHIFTS TIME OFF

Updated 9:42 am

filter shifts

Jobs: 1 Employees: 2 Update May 29 – Jun 4, 2023 CDT

	Mon 5/29	Tue 5/30	Wed 5/31	Thu 6/1	Fri 6/2	Sat 6/3	Sun 6/4
ANY TIME		Molly Aaron (OFF)	Molly Aaron (OFF)				
12am							
1am							
2am							
3am							
4am							
5am							
6am							
7am							
8am							
9am		9:00am - 5:00pm [Quincey Aaron] - Work	9:00am - 5:00pm Molly Aaron - Work				
10am							
11am							
12pm							
1pm							
2pm							
3pm							
4pm							
5pm							
6pm							
7pm							
8pm							
9pm							
10pm							
11pm							

Molly's Shift for the day has been reassigned

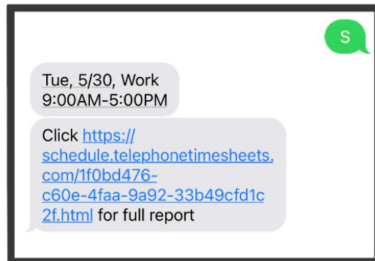
Highlight by Schedule



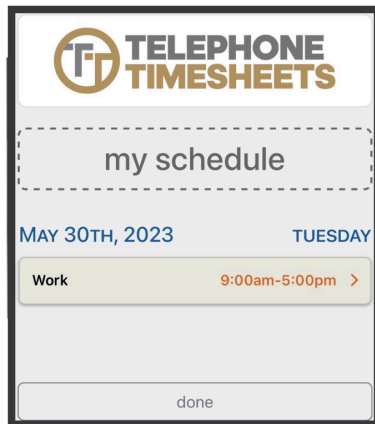
3.4.5. Allow Employees To Retrieve Their Schedule

Employees can view their schedule in 2 different ways:

1. Employees can text the letter 's' to Telephone Timesheets at any time to receive a listing of their current schedule. In the United States and Canada, employees send a text message to the same toll-free number that they normally call.



2. Employees can open the employee web portal to view their schedule.

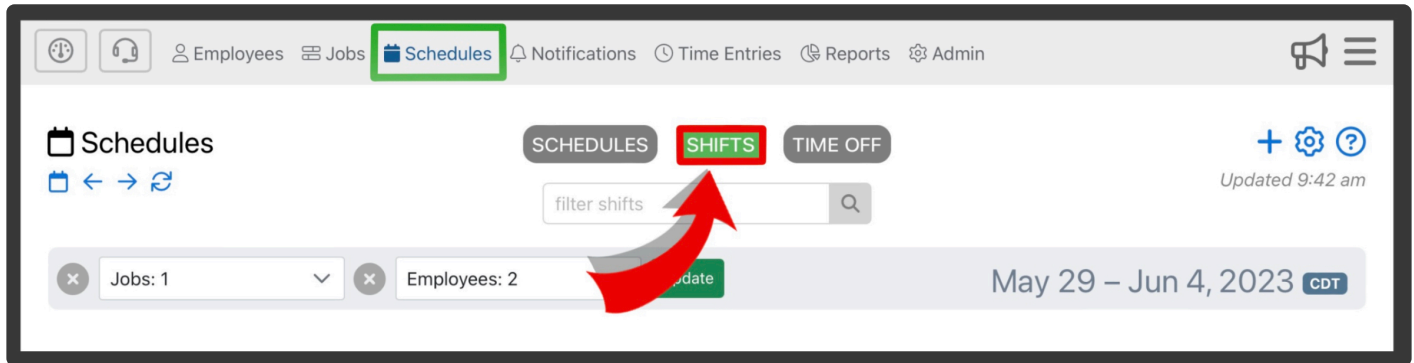


* **NOTE:** In the United Kingdom, toll-free numbers cannot receive text messages, so employees will need to send hours worked inquiry text messages and schedule inquiry text messages to +44 20 3322 3496. This is a dedicated UK number that Telephone Timesheets uses for both sending and receiving text messages.



3.4.6. Editing An Individual Shift

To edit an individual shift, click on the Shift tab at the top of the Schedule page.



Here you can select a single shift to edit. The start/end time, employee scheduled, and the status of the schedule can all be edited for an individual shift. Click [Here](#) to view an instructional video on how to edit individual shifts.



3.4.7. Offering Shifts

Admin are able to offer open shifts to employees in the Shift view of the Schedules page. To offer a shift, first select the open shift you wish to fill. Then, you will be prompted to “Offer Shift”. From there, you will be brought to the **Offer Shift** form.

The screenshot displays the Schedules page in the Telephone Timesheets application. The top navigation bar includes links for Employees, Jobs, Schedules (highlighted), Notifications, Time Entries, Reports, and Admin. The main header shows 'Open Shifts 1' and a 'Schedules' section with tabs for SCHEDULES, SHIFTS, and TIME OFF. A filter bar allows selecting jobs and employees, with an 'Update' button. The calendar grid shows dates from Mon 6/19 to Sun 6/25. The 'Thu 6/22' column is highlighted in yellow, and a red box indicates an open shift offer from 1:10pm to 11:00pm for the job 'Admin/Settings+Billing'. A red arrow points to this offer. The bottom panel shows details for the open shift, including the job title 'Admin/Settings+Billing', the employee 'Quincy Aaron', and the date 'Thu, Jun 22nd 2023'. A red button indicates 'Starts in 33 minutes'.

Highlights of This Form

Offer Notice

This notice is displayed to the employee when they view the open shift offer. In order to view the shift offer details, the employee must click the link sent to them via text message. Use this field to provide any extra information they might need to decide whether or not they would be able to fill the shift.

Admin Notes

Here, you can enter any notes that may be important information for admin in regards to this offered shift. Other admin will be able to view these notes you create.

Target Employees

Here, you can specify which employees will be notified of this offering. You can select all, or specific employees.

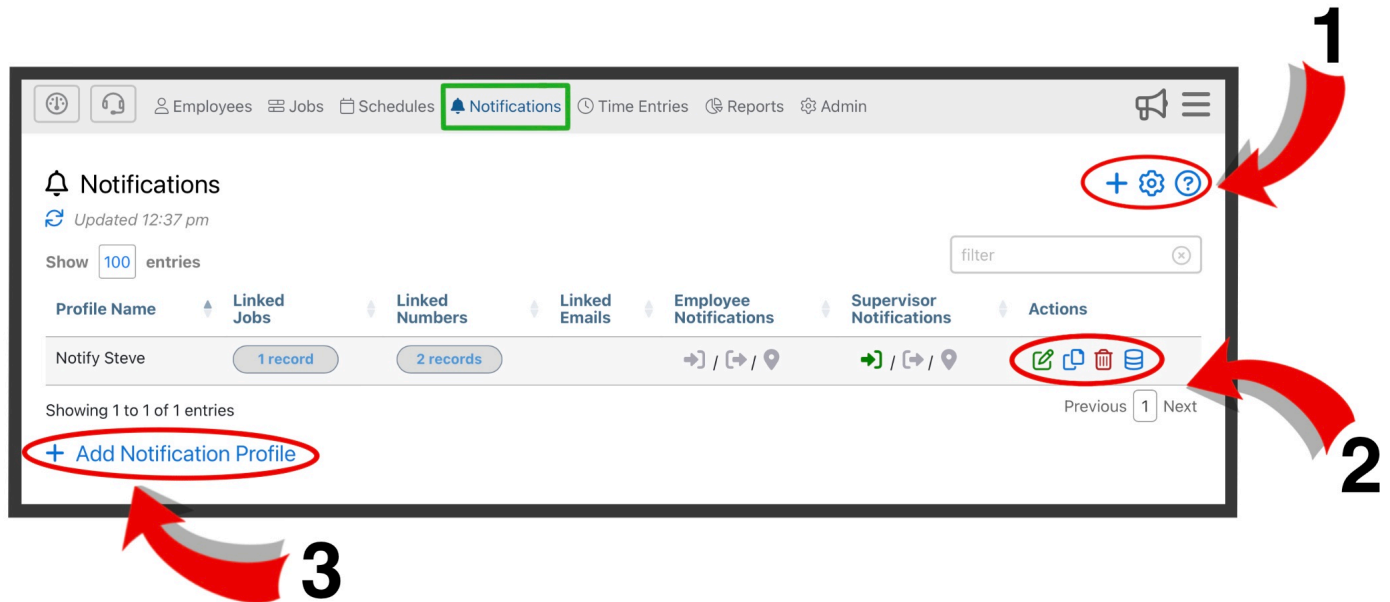
Assign shift to first employee who accepts




When enabled, the first employee to accept a shift offer will automatically be assigned to that shift. When disabled, multiple employees may accept the shift, but won't be filled until a supervisor manually fills the shift.





3.5. Notifications


Telephone Timesheets has the most robust notifications system on the market. When properly configured, the system will perform the functions of a dispatcher; watching your schedules and employee behavior and taking action whenever there is an issue that needs to be addressed.

Highlights of the Notifications Page



1. Here you can add a Notification Profile , adjust settings , and find additional information about the notifications page .

2. Here you can edit , delete , copy Notification Profiles , and view audit history .

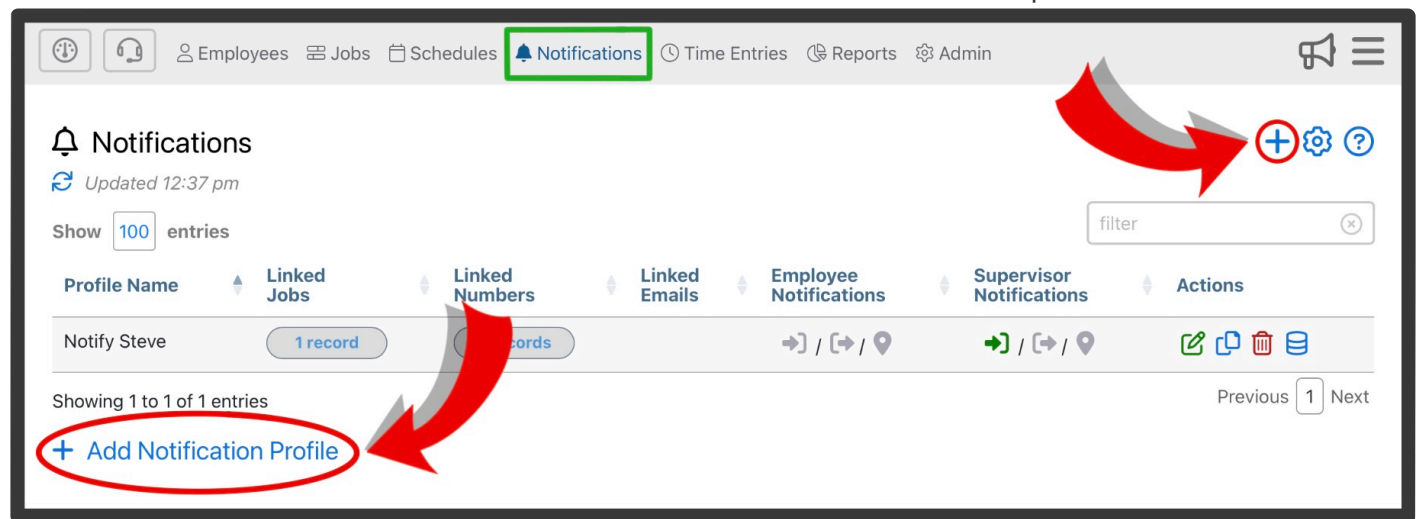
3. Here, you can add a new Notification Profile. This has the same function as the blue plus sign  in the upper right corner.



3.5.1. Adding Notification Profiles

Notification Profiles are collections of business rules that can be applied on a per-job basis. Notification Profiles contain rules that the Telephone Timesheets “Virtual Dispatcher” should follow. Each Notification Profile contains one or more rules such as who should be notified (employee, supervisor, client, vendor, etc.) and when and how they should be notified (call, text, email). After you’ve configured your Notification Profiles, you can link them to the jobs where these rules will be in effect. For more information on linking jobs to Notification Profiles, go to the [Linking Jobs To Notification Profiles](#) section of the manual.

You can create a new Notification Profile by either using the **+** icon in the upper right corner or use the **+ Add Notification Profile** in the lower left corner of the Notifications section of the portal.



This will bring you to the **Add Profile** form where you can enter the Profile Name, Linked Jobs, and notification details.

Highlights of This Form:

Profile Name

Here, the title to the Notification Profile is entered. This will be visible in jobs that are linked to the Notification Profile.

Linked Jobs

Here, the jobs can be linked to the Notification Profile. Jobs must be linked in order to receive the desired notifications. Notification profiles can also be linked to jobs through the Job form. For more information on how to link jobs to Notification Profiles, go to the [Linking Jobs To Notification Profiles](#) section of the manual.

Call for Employee:

Employees can only be notified via phone call. The phone number that will be called is the one entered in the Mobile Number field in the Add/Edit Employee form. If the number entered here is not their phone number, they will not be able to be notified through Telephone Timesheets. For more information on Mobile

numbers, go to the [Adding Employees](#) section of the manual.

Call Employee For:

☒ **Late check in**
when they are min late

☒ **Late check out**
when they are min late

☒ **Late checkpoint**
when they are min late for their checkpoint
interval of min

- **Late check in**

When selected, you can determine how long until the employee is notified for a late check in, how often the notification repeats and for how long it will repeat.

e.g. when they are ___ min late and repeat notification every ___ min for ___ min or until employee checks in

- **Late check out**

When selected, you can determine how long until the employee is notified for a late check out, how often the notification repeats and for how long it will repeat.

e.g. when they are ___ min late and repeat notification every ___ min for ___ min or until employee checks in

- **Late checkpoint**

When selected, you can determine how long until the employee is notified for a late checkpoint.

Check points can be enforced by setting an interval for how frequently an employee must submit a checkpoint. For example, if an employee must submit a checkpoint every 60 minutes, but is 5 minutes late to one or more of their checkpoints, the employee will be notified. The amount of time until an employee is notified can be adjusted.

e.g. when they are ___ min late for their checkpoint interval of ___ min

Notify Client When:

This section of the Add Profile form is hidden. When hidden, this feature will not be visible in the Add Profile form. Contact support@telephonetimesheets to make visible. If made visible, you will be able to notify clients. When notifying a client, you have the option to notify them via call, text, or email. At the bottom of the Notify Client When section, you will be required to enter a phone number, and(or) email to notify that client. When call or text is selected, you must put in the clients phone number. When emails is selected, you must put in the clients email. You are able to add multiple phone numbers and emails that will be notified.

- **Employee submits either an incident report or a vehicle inspection report**

When selected, If an employee submits an incident or vehicle inspection report the client will be

notified via call, text, or email.

Notify Supervisors When:

When notifying a supervisor, you have the option to notify them via call, text, or email. At the bottom of the Notify Supervisors When section, you will be required to enter a phone number, and(or) email to notify that supervisor. When call or text is selected, you must put in the supervisors phone number. When emails is selected, you must put in the supervisors email. You are able to add multiple phone numbers and emails that will be notified.

Add Profile

Notify Supervisor When:

Employee is late checking in

☐ Call ☐ SMS ☐ Email

Employee checks out early

☐ Call ☐ SMS ☐ Email

Employee checks out late

☐ Call ☐ SMS ☐ Email

Employee has a GPS issue

☐ Call ☐ SMS ☐ Email

Employee is late sending checkpoint

☐ Call ☐ SMS ☐ Email

Employee gets unscheduled version of job

☐ Call ☐ SMS ☐ Email

Employee submits either an incident report or a vehicle inspection report

☐ Call ☐ SMS ☐ Email

- **Employee is late checking in**

When selected, supervisors are notified when the employee is a certain number of minutes late to checking in. For example, if an employee still hasn't checked in after 15 minutes of their scheduled start time, the supervisor will be notified. The amount of time until a supervisor is notified can be adjusted. If an employee is late to their check in, you can optionally get notified when they do finally check in.

- **Employee checks out early**

When selected, supervisors are notified when the employee is a certain number of minutes early checking out. For example, if an employee checks out 10 minutes or more before their scheduled end time, the supervisor will be notified. The time until a supervisor is notified can be adjusted.

- **Employee checks out late**

When selected, supervisors are notified when the employee is a certain number of minutes late to checking out. For example, if an employee still hasn't clocked out after 10 minutes of their scheduled end time, the supervisor will be notified. The amount of time until a supervisor is notified can be adjusted.

- **Employee has a GPS issue**

When selected, supervisors are notified when the employee is a certain number of minutes late to sharing their location after checking in or out. For example, if an employee still hasn't shared their location after 5 minutes of checking in or out, the supervisor will be notified. The amount of time until a supervisor is notified can be adjusted.

Additionally, supervisors can be notified if the GPS Share shows their location is a certain distance away from the job site. For example, if an employee shared location is 500 meters or more away from the job site, the supervisor will be notified.

- **Employee is late sending checkpoint**

When selected, supervisors are able to enforce checkpoints using an Interval (e.g. required check point every 15min- 30 min- 60min). By enabling this Notification Profile setting, the supervisors can be notified every time the employee is a certain number of minutes late to sending a checkpoint. For example, if an employee must submit a checkpoint every 60 minutes, but is 5 minutes late to one or more of their checkpoints, the supervisor will be notified. The amount of time until a supervisor is notified can be adjusted.

- **Employee gets unscheduled version of job**

When selected, supervisors are notified if an employee checks in to a job that is unscheduled. This setting only applies to employees using job codes. For example, if an employee successfully checks in using a job code for a job that isn't scheduled, the supervisors will be notified.


You can make it so employees are unable to check in using job codes for jobs that aren't scheduled. To do this, go to Admin—> Settings—> General Settings—> check the box labeled "Use job codes"—> uncheck the box labeled "Allow unscheduled jobs".

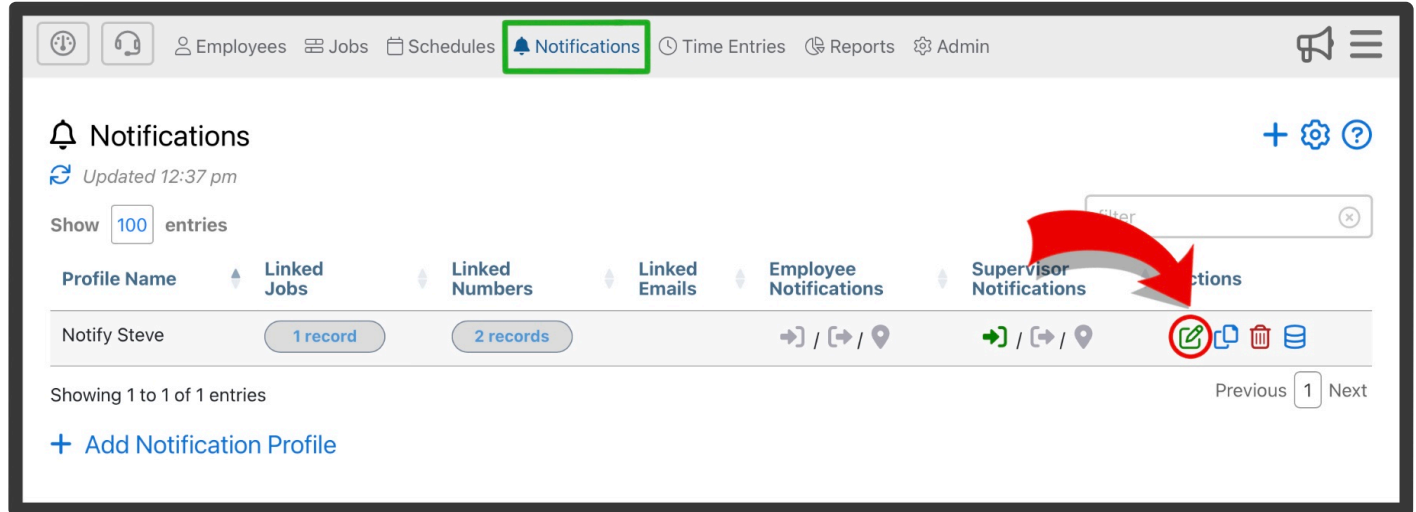
- **Employee submits either an incident report or a vehicle inspection report**

When selected, If an employee submits an incident or vehicle inspection report you will be notified via call, text, or email.



3.5.2. Editing Notification Profiles

You can edit a Notification Profile by clicking on the green edit button  in the Actions column. This will bring you to the **Edit Profile** form. Here you can modify any preferences in the Notification Profile. This will have the same fields as the Add Profile form. Go to the [Adding Notification Profiles](#) section of the manual to learn more about the form.



Notifications Updated 12:37 pm

Show entries

Profile Name	Linked Jobs	Linked Numbers	Linked Emails	Employee Notifications	Supervisor Notifications	Actions
Notify Steve	1 record	2 records	→ / ↔ / 📍	→ / ↔ / 📍	→ / ↔ / 📍	✎ + 🗑 📄

Showing 1 to 1 of 1 entries

[+ Add Notification Profile](#)

Previous Next

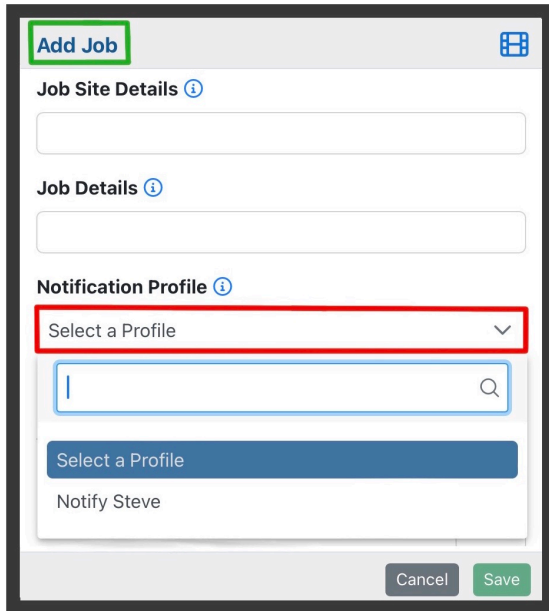


3.5.2.1. Linking Jobs To Notification Profiles

After you've configured your Notification Profiles, you can link them to Jobs. All the Notification Profiles that you create are reusable for future jobs.

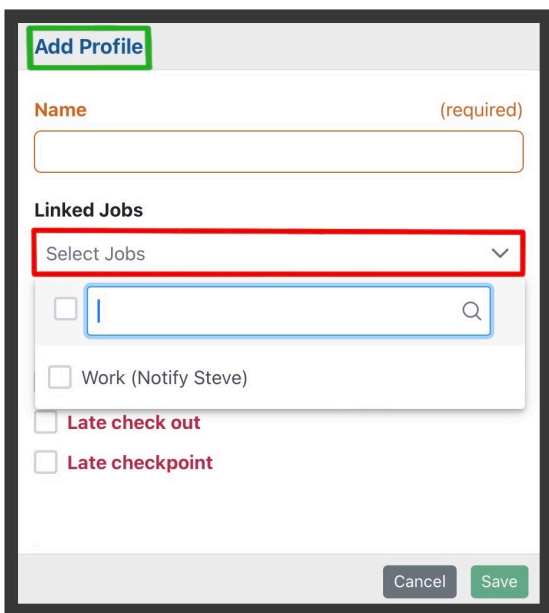
There are 2 ways to link a job to a Notification Profile:

1. Through the Add/Edit Job form. This can be done in the field labeled "Notification Profiles". Open the pull down menu and select the Notification Profile for the job.



The screenshot shows the 'Add Job' form. The 'Notification Profile' dropdown menu is open, displaying a search bar and a list of profiles. The profile 'Notify Steve' is visible in the list. The 'Add Job' button is highlighted in green at the top left. The 'Job Site Details' and 'Job Details' fields are empty. The 'Notification Profile' field is highlighted with a red border. The 'Cancel' and 'Save' buttons are at the bottom right.


2. Though the Add/Edit Profile form. This can be done in the field labeled "Linked Jobs". Open the pull down menu and select the job for the Notification Profile.

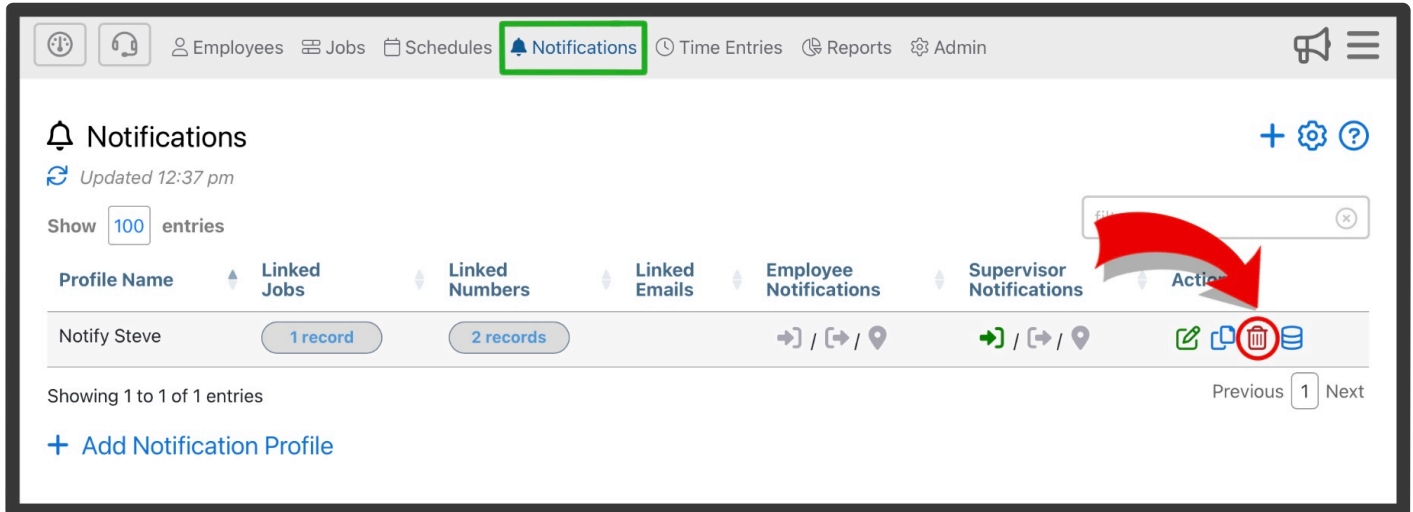


The screenshot shows the 'Add Profile' form. The 'Linked Jobs' dropdown menu is open, displaying a search bar and a list of jobs. The job 'Work (Notify Steve)' is visible in the list. The 'Add Profile' button is highlighted in green at the top left. The 'Name' field is empty and marked as required. The 'Linked Jobs' field is highlighted with a red border. The 'Cancel' and 'Save' buttons are at the bottom right.



3.5.3. Deleting Notification Profiles





To manually delete a Notification Profile, click on the red Delete button  in the Action column for that Notification Profile in the table.



Notifications

Updated 12:37 pm

Show 100 entries

Profile Name	Linked Jobs	Linked Numbers	Linked Emails	Employee Notifications	Supervisor Notifications	Action
Notify Steve	1 record	2 records				   

Showing 1 to 1 of 1 entries

[+ Add Notification Profile](#)

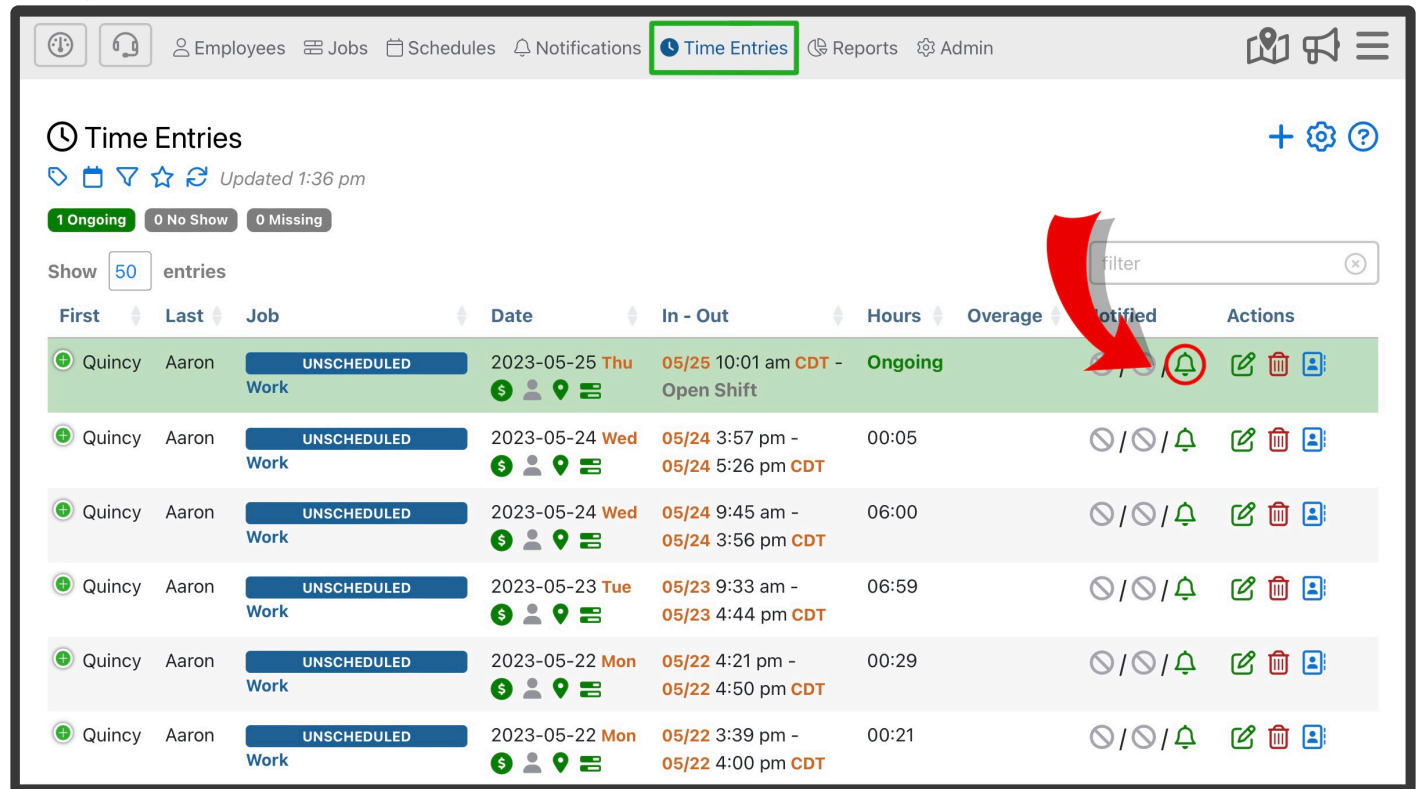
Previous 1 Next



3.5.4. Pausing & Disabling Notifications

You can disable notifications or temporarily pause notifications for a particular job from the Time Entries section of the Admin Portal.

First, you will have to click the notification icon in the Notified column.



The screenshot shows the 'Time Entries' section of the Admin Portal. The top navigation bar includes icons for Employees, Jobs, Schedules, Notifications, Time Entries (selected), Reports, and Admin. Below the navigation bar, the 'Time Entries' section is displayed with a clock icon and the title 'Time Entries'. There are filters for '1 Ongoing', '0 No Show', and '0 Missing'. A 'Show 50 entries' dropdown is visible. The main table has columns: First, Last, Job, Date, In - Out, Hours, Overage, Notified, and Actions. The first row is highlighted in green and shows an 'Ongoing' job for 'Quincy Aaron' on '2023-05-25 Thu'. A red arrow points to the notification icon (bell) in the 'Notified' column of this row. The other rows show 'UNSCHEDULED Work' for 'Quincy Aaron' on various dates in May 2023.

First	Last	Job	Date	In - Out	Hours	Overage	Notified	Actions
Quincy	Aaron	UNSCHEDULED Work	2023-05-25 Thu	05/25 10:01 am CDT - Open Shift	Ongoing			
Quincy	Aaron	UNSCHEDULED Work	2023-05-24 Wed	05/24 3:57 pm - 05/24 5:26 pm CDT	00:05			
Quincy	Aaron	UNSCHEDULED Work	2023-05-24 Wed	05/24 9:45 am - 05/24 3:56 pm CDT	06:00			
Quincy	Aaron	UNSCHEDULED Work	2023-05-23 Tue	05/23 9:33 am - 05/23 4:44 pm CDT	06:59			
Quincy	Aaron	UNSCHEDULED Work	2023-05-22 Mon	05/22 4:21 pm - 05/22 4:50 pm CDT	00:29			
Quincy	Aaron	UNSCHEDULED Work	2023-05-22 Mon	05/22 3:39 pm - 05/22 4:00 pm CDT	00:21			

Then, you will be able to enable/disable notifications for that particular job. You also have the option to pause notifications until a specific date. Notifications will automatically unpause on the day you select underneath "Pause Until".

The screenshot shows the 'Time Entries' section of the Telephone Timesheets application. The interface includes a top navigation bar with icons for Employees, Jobs, Schedules, Notifications, Time Entries (active), Reports, and Admin. Below the navigation bar, there's a header for 'Time Entries' with a clock icon, a filter icon, and a status bar showing '1 Ongoing', '0 No Show', and '0 Missing'. A 'Show 50 entries' dropdown is present. The main table lists time entries with columns for First, Last, Job, Date, Time, Overage, Notified, and Actions. A modal dialog is open, showing a toggle for 'Notifications enabled' (currently on) and a 'Pause Until' date selector (currently 'Not Set'). The dialog has 'Cancel' and 'Update' buttons.

First	Last	Job	Date	Time	Overage	Notified	Actions
Quincy	Aaron	UNSCHEDULED Work	2023-05-23 Tue	05/23 9:33 am - 06:59		/ / /	[edit] [delete] [info]
Quincy	Aaron	UNSCHEDULED Work	2023-05-23 Tue	05/23 4:44 pm CDT		/ / /	[edit] [delete] [info]
Quincy	Aaron	UNSCHEDULED Work	2023-05-22 Mon	05/22 4:21 pm - 00:29		/ / /	[edit] [delete] [info]
Quincy	Aaron	UNSCHEDULED Work	2023-05-22 Mon	05/22 4:50 pm CDT		/ / /	[edit] [delete] [info]
Quincy	Aaron	UNSCHEDULED Work	2023-05-22 Mon	05/22 3:39 pm - 00:21		/ / /	[edit] [delete] [info]
Quincy	Aaron	UNSCHEDULED Work	2023-05-22 Mon	05/22 4:00 pm CDT		/ / /	[edit] [delete] [info]

Notifications can be paused for one or more employees by scheduling time off. You can request time off by creating a Time Off entire in the Schedules section of the Admin Portal.

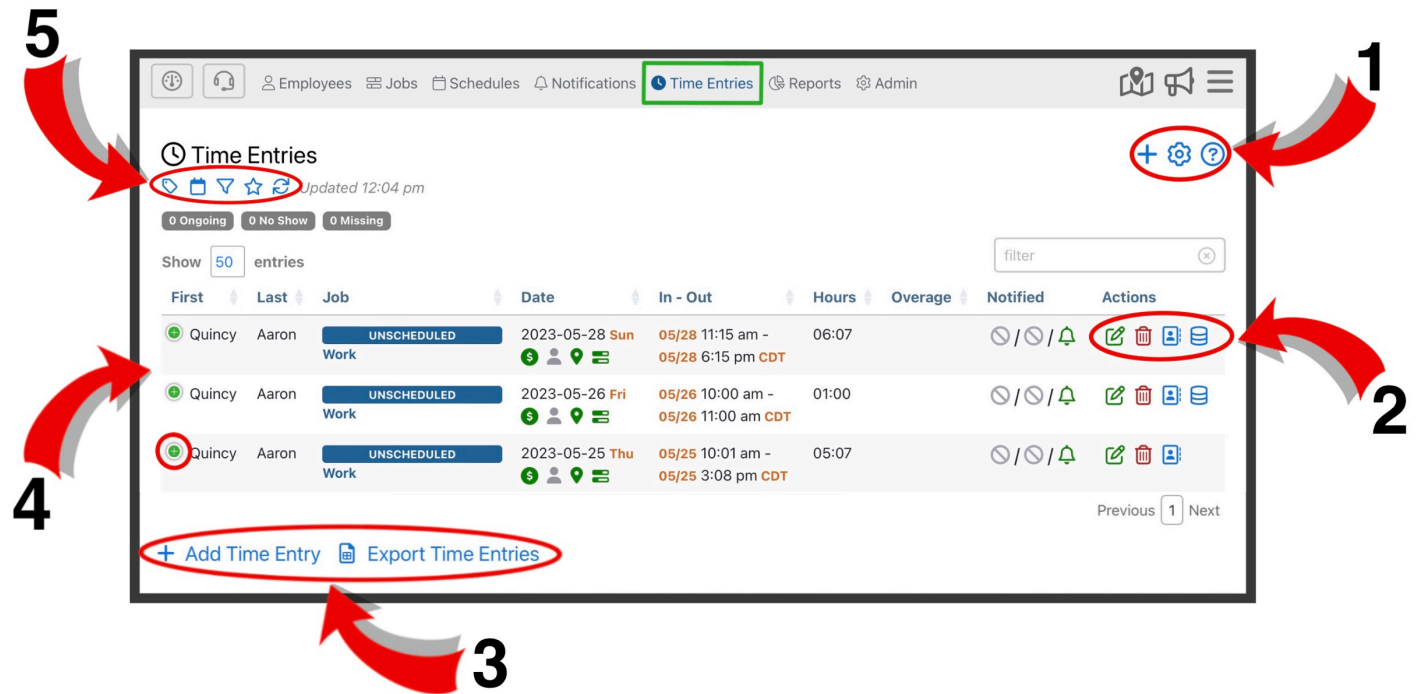
✿ For more information of Time Off entries, go to the [Time Off Tracking](#) section of the manual.










3.6. Time Entries



The Time Entries section of the portal is the place you are likely to visit most often. It contains an up-to-the-minute view of every timesheet entry your employees have ever created. You can easily see who is currently checked in throughout the day, using any device.


Highlights of The Time Entries Page








1. Here you can add a time entry , adjust settings , and find additional information about the time entries page .

2. Here you can edit  time entries, delete  time entries, view an employees contact information and [click-to-call](#) , and audit history .

3. Here, you can add a new time entry. This has the same function as the blue plus sign  in the upper right corner. You can also download time entry records by clicking  [Export Time Entries](#)

4. Here you can expand a time entry by clicking the  icon.

5. Here, you can filter time entries using certain criteria using the tag filter , view your time entries on a day-by-day basis , select a date range filter which will show only time entries from that range , show time entries from the last 30 days that may need attention , and refresh the Time Entries page .

3.6.1. Adding Time Entries

You can create a new time entry by either using the **+** icon in the upper right corner or use the **+ Add Time Entry** in the lower left corner of the Time Entries section of the portal.

Time Entries

Updated 12:04 pm

0 Ongoing 0 No Show 0 Missing

Show 50 entries

filter

First	Last	Job	Date	In - Out	Hours	Overage	Notified	Actions
Quincy	Aaron	UNSCHEDULED Work	2023-05-28 Sun	05/28 11:15 am - 05/28 6:15 pm CDT	06:07		🔕 / 🔕 / 🔔	✎ 🗑️ 👤 📄
Quincy	Aaron	UNSCHEDULED Work	2023-05-26 Fri	05/26 10:00 am - 05/26 11:00 am CDT	01:00		🔕 / 🔕 / 🔔	✎ 🗑️ 👤 📄
Quincy	Aaron	UNSCHEDULED Work	2023-05-25 Thu	05/25 10:01 am - 05/25 3:08 pm CDT	05:07		🔕 / 🔕 / 🔔	✎ 🗑️ 👤 📄

Previous 1 Next

+ Add Time Entry Export Time Entries

This will bring you to the **Add Time Entry** form where you can enter all of the elements of a timesheet entry. This is useful if an employee was not able to check in or out. As an administrator of the portal, you can create that time entry for them exactly as if they had checked in and out themselves.

Highlights of This Form:

Employee

Time entries are made on a per employee basis. Jobs with multiple assigned employees will give each employee their own time entry. When creating a time entry, you can only select one employee.

Job

There are 2 different types of jobs to select for a time entry:

1. Unscheduled Job: Here, you are able to select any unscheduled job for the time entry.
2. Scheduled Shift: Here, you can select a scheduled shift for the time entry. You must have a job already scheduled for that employee to use this feature.

Start Date

Here, you select the start date for the time entry. This most often is the same start date as selected in the Start/End Time fields of the form.

Start/End Time

Select the start/ end time for the schedule entry. You also have the ability to adjust the date of the start and end time for multi-day shifts.

✿ To learn more about multi-day jobs, go to the [Multi-Day Jobs](#) section of the manual.

Break Length

By clicking image you can enter the break length for that time entry. This can only be done once the time entry has been created, meaning you'll have to enter the break length via the Edit Time Entry form.

Check In/Out photos

Here, you can upload an employees check in/out photos if they have them


Bill/Pay Rates

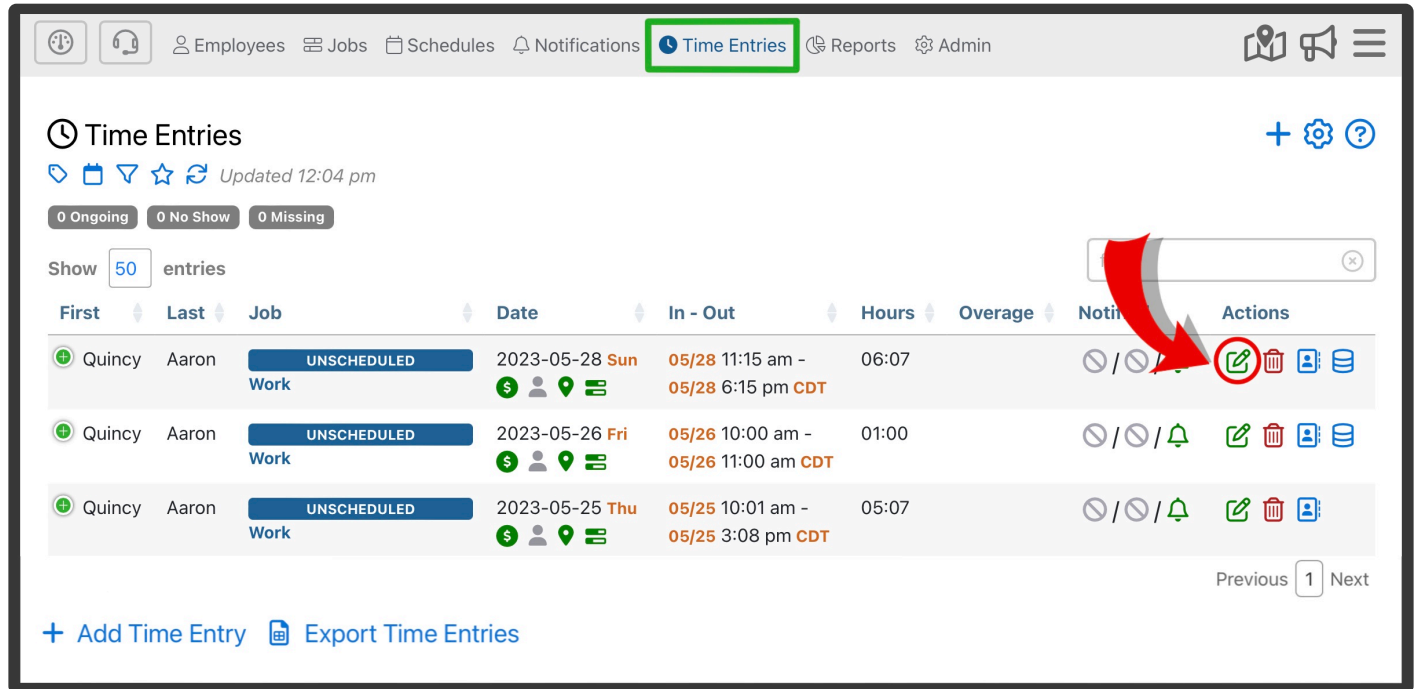
Here, you can adjust time entries bill or pay rates to employees, clients, and vendors.

✿ To learn more about including pay rate info in time entries, go to the [Including Pay Rate Info In The Time Entries](#) section of the manual.



3.6.2. Editing Time Entries













You can edit a time entry by clicking on the green edit button  in the Actions column for that time entry. This will bring you to the **Edit Time Entry** form. Here you can modify an entries details. This will have the same fields as the Add Time Entry form. Go to the [Adding Time Entries](#) section of the manual to learn more about the form.



Time Entries Updated 12:04 pm


0 Ongoing 0 No Show 0 Missing

Show entries

First	Last	Job	Date	In - Out	Hours	Overage	Notif	Actions
Quincy	Aaron	UNSCHEDULED Work	2023-05-28 Sun	05/28 11:15 am - 05/28 6:15 pm CDT	06:07		   	
Quincy	Aaron	UNSCHEDULED Work	2023-05-26 Fri	05/26 10:00 am - 05/26 11:00 am CDT	01:00		   	
Quincy	Aaron	UNSCHEDULED Work	2023-05-25 Thu	05/25 10:01 am - 05/25 3:08 pm CDT	05:07		   	


Previous Next

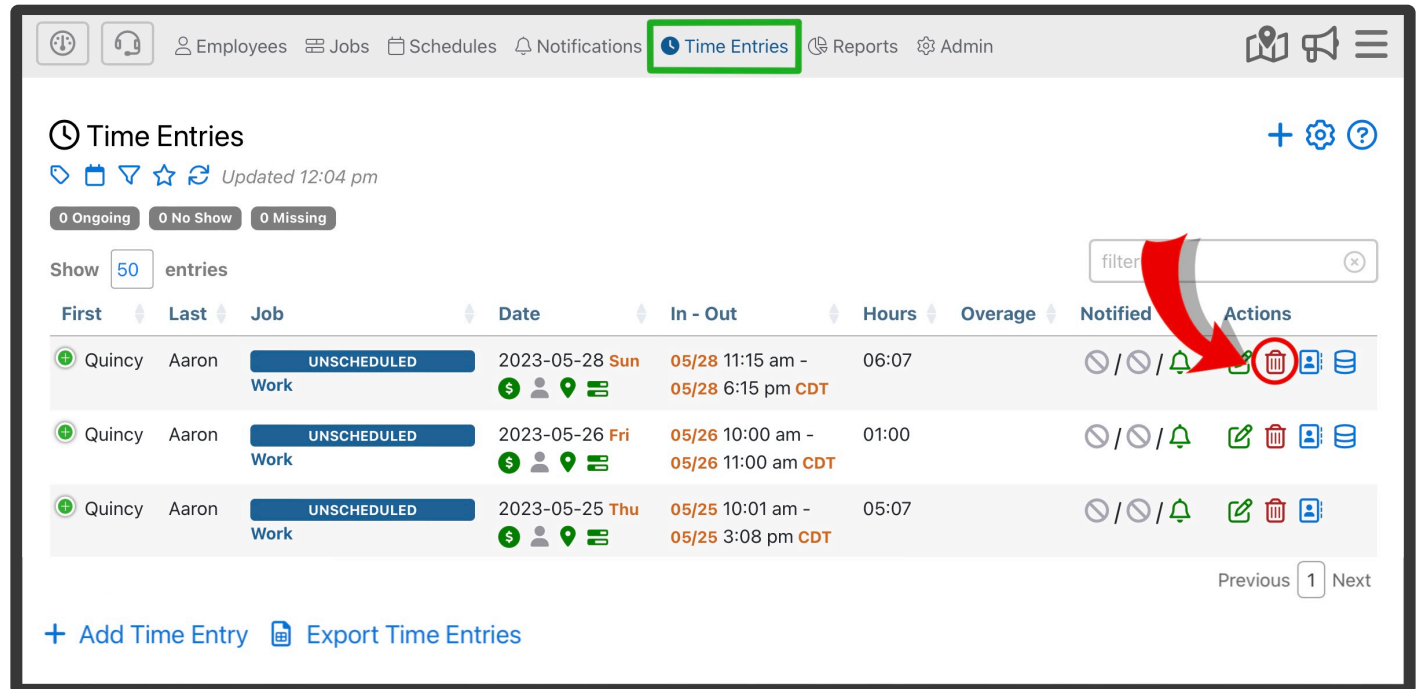
[+ Add Time Entry](#) [Export Time Entries](#)

If you do not see the green Edit button, it is because the screen is too small and you will need to expand that entry by first clicking on the green plus icon  immediately to the left of the entry.

! You cannot edit Time Entries that have been exported to QuickBooks Online. Be sure to review all of your Time Entries thoroughly before performing an export.

3.6.3. Deleting Time Entries

To manually delete a Time Entry, click on the red Delete button  in the Action column for that Time Entry entry in the table.



The screenshot shows the 'Time Entries' section of the application. The top navigation bar includes icons for a clock, headset, and menu, followed by links for Employees, Jobs, Schedules, Notifications, **Time Entries** (highlighted with a green box), Reports, and Admin. On the right are icons for location, volume, and a hamburger menu.

Below the navigation bar, the 'Time Entries' section is titled with a clock icon. It includes a status bar with '0 Ongoing', '0 No Show', and '0 Missing'. A 'Show 50 entries' dropdown is on the left, and a 'filter' input field is on the right. The table below has columns: First, Last, Job, Date, In - Out, Hours, Overage, Notified, and Actions.

First	Last	Job	Date	In - Out	Hours	Overage	Notified	Actions
Quincy	Aaron	UNSCHEDULED Work	2023-05-28 Sun	05/28 11:15 am - 05/28 6:15 pm CDT	06:07			
Quincy	Aaron	UNSCHEDULED Work	2023-05-26 Fri	05/26 10:00 am - 05/26 11:00 am CDT	01:00			
Quincy	Aaron	UNSCHEDULED Work	2023-05-25 Thu	05/25 10:01 am - 05/25 3:08 pm CDT	05:07			

At the bottom right of the table is a pagination control: 'Previous 1 Next'. At the bottom left are links for '+ Add Time Entry' and 'Export Time Entries'.

3.6.4. Click -to-Call From Time Entry

This feature is hidden. When hidden, this feature will not be usable. Contact support@telephonetimesheets to enable this feature. If enabled, you can easily call or text any employee, supervisor, client, or vendor that is associated with a time entry. If you see a time entry that requires you to send a message or make a phone call (a no-show, missed clock out, missed checkpoint, etc.) you can have our system place a call or send a text on your behalf. All calls will be recorded and transcribed so you will have a record of all calls initiated through this feature. You will have a record of all texts as well.

All calls and texts are logged in the Call Log. Each call is also recorded and transcribed. When the call is complete, the system will email the audio recording, the transcript, and other call details to the email address of your choice.

✿ To receive an email the recording and transcript of your call, go to Admin—> Settings—> General Settings—> Call Center—> select the check box “Record all outbound calls” and “Email all outbound call recordings”

In order to initiate a call, click on the blue contact card icon in the Actions column of the time entry.

The screenshot shows the 'Time Entries' section of the application. At the top, there are navigation tabs: Employees, Jobs, Schedules, Notifications, Time Entries (selected), Reports, and Admin. Below the tabs, there are filters for '0 Ongoing', '0 No Show', and '0 Missing'. The table displays three time entries for 'Quincy Aaron' with the job 'Work'. Each entry is marked as 'UNSCHEDULED'. The first entry is for '2023-05-28 Sun' with 'In - Out' times of '05/28 11:15 am - 06:07' and '05/28 6:15 pm CDT'. The second entry is for '2023-05-26 Fri' with 'In - Out' times of '05/26 10:00 am - 01:00' and '05/26 11:00 am CDT'. The third entry is for '2023-05-25 Thu' with 'In - Out' times of '05/25 10:01 am - 05:07' and '05/25 3:08 pm CDT'. The 'Actions' column for each entry contains several icons: a bell, a trash can, a contact card (highlighted with a red circle and a red arrow), and a document icon. At the bottom, there are links for '+ Add Time Entry' and 'Export Time Entries'.

First	Last	Job	Date	In - Out	Hours	Overage	Notified	Actions
Quincy	Aaron	UNSCHEDULED Work	2023-05-28 Sun	05/28 11:15 am - 06:07 05/28 6:15 pm CDT	06:07		🔔 / 🗑️ / 📞 / 📄	
Quincy	Aaron	UNSCHEDULED Work	2023-05-26 Fri	05/26 10:00 am - 01:00 05/26 11:00 am CDT	01:00		🔔 / 🗑️ / 📞 / 📄	
Quincy	Aaron	UNSCHEDULED Work	2023-05-25 Thu	05/25 10:01 am - 05:07 05/25 3:08 pm CDT	05:07		🔔 / 🗑️ / 📞 / 📄	

Then choose the employee, supervisor, client, or vendor that you wish to call. The Telephone Timesheets click-to-call system will then place two calls. One to the person you are calling, and the other to your mobile phone or desk phone. We will bridge these two calls together. The calls will be placed from the same toll-free number that your employees use to clock in.

Contacts Admin Notes Comm Log

Employee ▼

Quincy Aaron
(612) 356-8003

Text Call











Quincy Aaron / 2023-06-01

3.6.5. Troubleshooting Time Entries

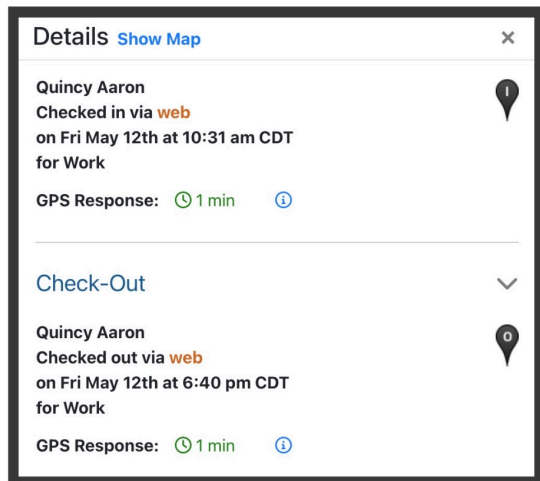
Sometimes, you may want to dig into the details of a time entry to determine why an employee clocked in the way they did. You may want answers to questions like:

- Did they call from the wrong number?
- Did they enter the wrong job code?
- Did they block their GPS?
- Did someone alter their time entry?


The Details In/Out column shows how the employee clocked in/out:

-  — Employee has no proximity issue and shared their location
-  — Blocked GPS sharing
-  — Employee has proximity issue to job sight far away
-  — Employee calls in from a known landline
-  — Employee calls in from a landline that is unknown
-  — Employee clocked in/out manually by an administrator
-  /  — This icon will be green if an employee submits check in/out notes, in no check in/out notes are submitted it will be grey.
-  /  — This icon will be green if an employee submits check in/out photos, in no check in/out photos are submitted it will be grey.

Clicking on any of these icons will provide more detailed information about check in/out. It displays many details about how the employee clocked in/out, along with other system information that can be useful in determining why a time entry looks the way it does.



You can navigate directly to the **Audit Log** record to see a history of any changes to this

time entry using the  icon in the actions column as shown below.

3.7. Integrations

Telephone Timesheets supports direct integration to the following platforms.

- ADP Run
- ADP Workforce Now
- QuickBooks Online
- QuickBooks Desktop
- When To Work
- When I Work

In addition to these built-in integrations, we provide an [open API](#).

NOTE: We also can support file-based integrations. You can upload files from your existing system(s) to synchronize data like employees, supervisors, schedules, etc.

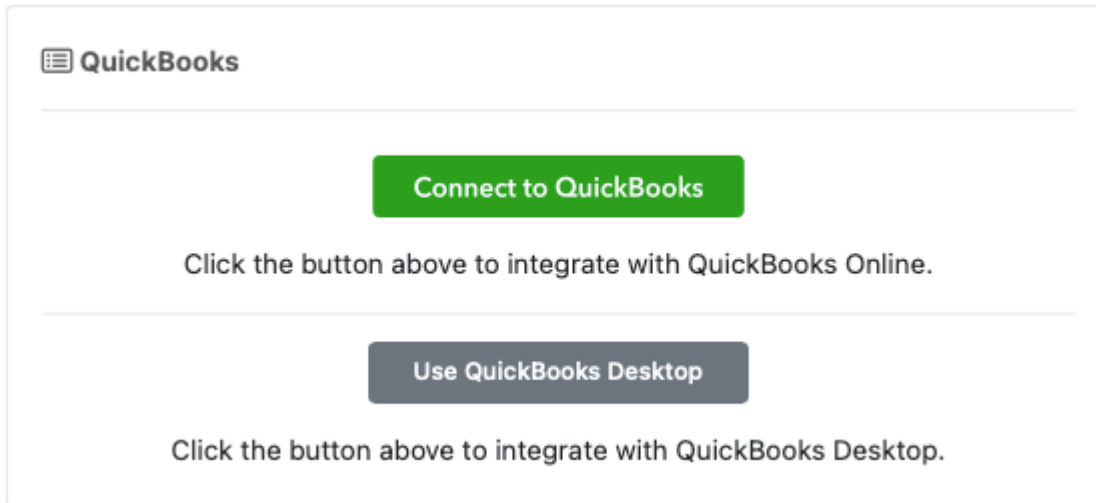
We recommend using an API-based approach for this type of integration, but a file-based approach can be a good interim step that does not require developing to our API.

Contact support@telephonetimesheets.com to request additional integrations or assistance with our open API or file-based integration.

3.7.1. QuickBooks

Telephone Timesheets can integrate with QuickBooks Desktop software **or** QuickBooks Online subscription service. Integration between Telephone Timesheets and QuickBooks is limited to a single QuickBooks company. If you have more than one QuickBooks company, you will need to create a separate Telephone Timesheets account for each company.

In order to setup integration between Telephone Timesheets and QuickBooks, you must first choose the version of QuickBooks you would like to integrate with.



Once you have selected the version of QuickBooks you are using, you can begin the integration process. Click on one of the links below to learn about the integration you have chosen.

[QuickBooks Online](#)

[QuickBooks Desktop](#)

3.7.1.1. QuickBooks Online

QuickBooks Online integration makes initial setup and ongoing payroll easy.

Telephone Timesheets imports your employees, customers, and service items from QuickBooks Online. In addition, Telephone Timesheets exports timesheet entries directly to QuickBooks Online with a mouse click.

The screenshot shows the 'Settings' page in the Telephone Timesheets application. At the top, there is a navigation bar with icons and labels for 'Employees', 'Job Sites', 'Jobs', 'Schedule', and 'Transactions'. Below this, the 'Settings' section is displayed with a user icon and a help button. The main content area is titled 'QuickBooks' and includes an 'Edit' button. It lists four integration actions: 'Import Employee Data', 'Import Customer Data', 'Import Service Item Data', and 'Export Transaction Data'. Each action has a corresponding 'Last import/export on' timestamp (all dated 'Fri. Nov. 24th, 2017 at 2:14: PM') and a 'View Log (No Errors)' button. A help icon is present next to each timestamp.

Action	Last Action On	Status
Import Employee Data	Fri. Nov. 24th, 2017 at 2:14: PM	No Errors
Import Customer Data	Fri. Nov. 24th, 2017 at 2:14: PM	No Errors
Import Service Item Data	Fri. Nov. 24th, 2017 at 2:14: PM	No Errors
Export Transaction Data	Fri. Nov. 24th, 2017 at 2:14: PM	No Errors

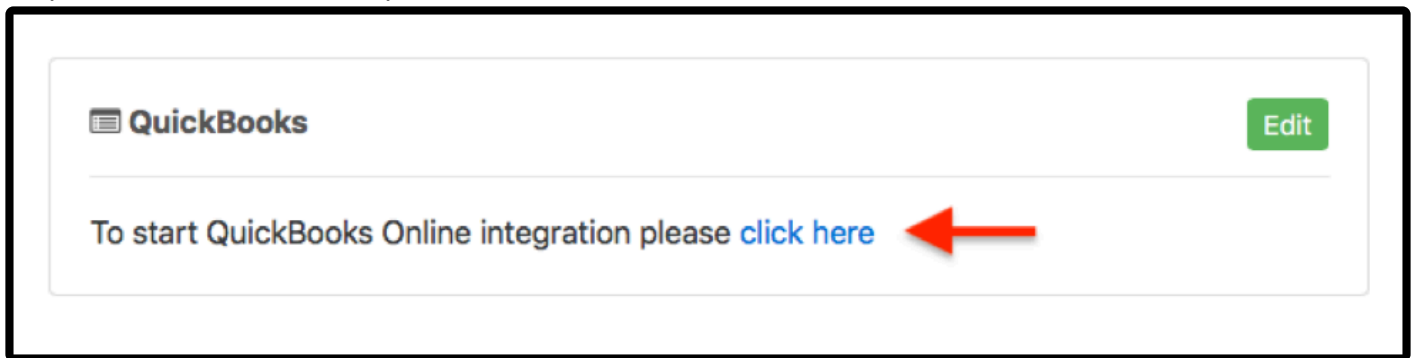
3.7.1.1.1. Setup Integration

QuickBooks Online integration allows you to export your timesheet Time Entries directly to QuickBooks Online.

From there, you can view reports and run payroll using the timesheet data that has been recorded by Telephone Timesheets.

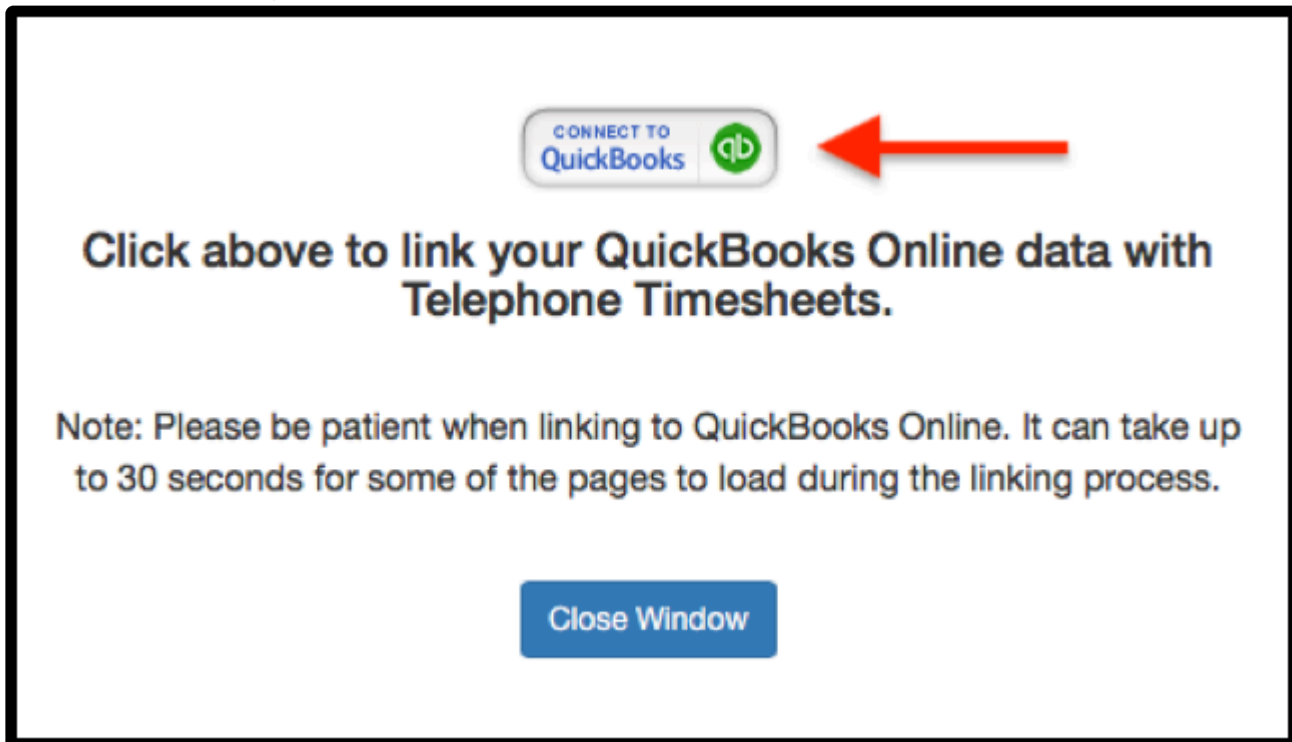
There are 5 steps to establishing a sync connection between Telephone Timesheets and QuickBooks Online.

Step 1: Click on the link to expose the “CONNECT TO QuickBooks” button.




Step 2: Click on the “CONNECT TO QuickBooks” button to start the process.

Note: You will need your QuickBooks Online credentials for the next step.





Step 3: Click on the “Authorize” button to authorize the integration between Telephone Timesheets and QuickBooks Online.

You will need your QuickBooks Online credentials to perform this authorization.

Welcome, **steve** ([Not you?](#))


Authorize the Sharing of Your Data Between Telephone Timesheets and Intuit



Home CaringTelephone Timesheets

By clicking **Authorize**, I allow Telephone Timesheets and Intuit to use my information* in accordance with each company's respective terms of service and privacy policy; Telephone Timesheets's [Terms of Service](#) and [Privacy Policy](#). Additionally, where applicable, I give Telephone Timesheets limited access to my QuickBooks Payments account to provide me payments-related services. I authorize the sharing of data between Intuit and Telephone Timesheets. *Information may include data from QuickBooks Online, QuickBooks Desktop and QuickBooks Payments.

No, thanks



Authorize

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Step 4: Click on the “Close Window” button to return to the Telephone Timesheets admin portal.

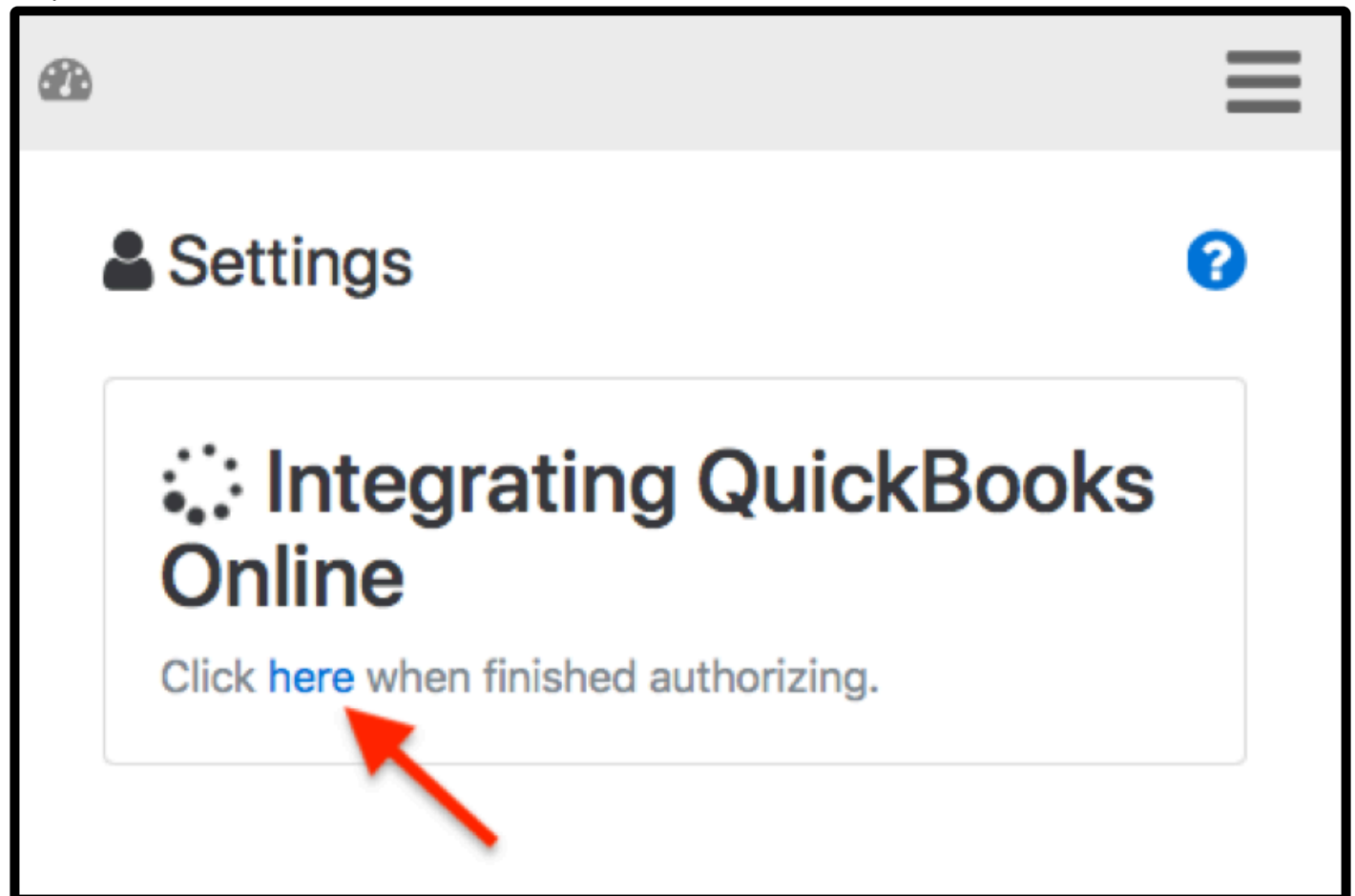
QuickBooks Integration Finished

Your QuickBooks Company Data has been successfully linked to the Telephone Time Sheets application. You may now close this window and begin importing data.



Close Window

Step 5: Click on the link to finish.





3.7.1.1.2. Importing Employees



With the initial integration complete, you are now ready to perform the initial import of your employee data. You cannot export any timesheet entries until you have first successfully imported your employees from QuickBooks Online.


*Note: * The master source of Employee records should be maintained in QuickBooks Online.


*Note: * All employees must have an accurate mobile phone number entry in QuickBooks Online in order to successfully import them into Telephone Timesheets.

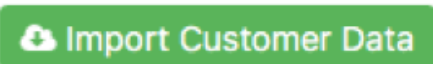



Settings


 **QuickBooks** 




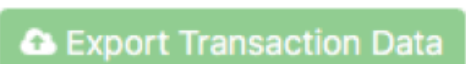
Last import on:
Ready for initial sync 




Last import on:
Ready for initial sync 



Last import on:
Ready for initial sync 



Last export on:
Ready for initial sync 

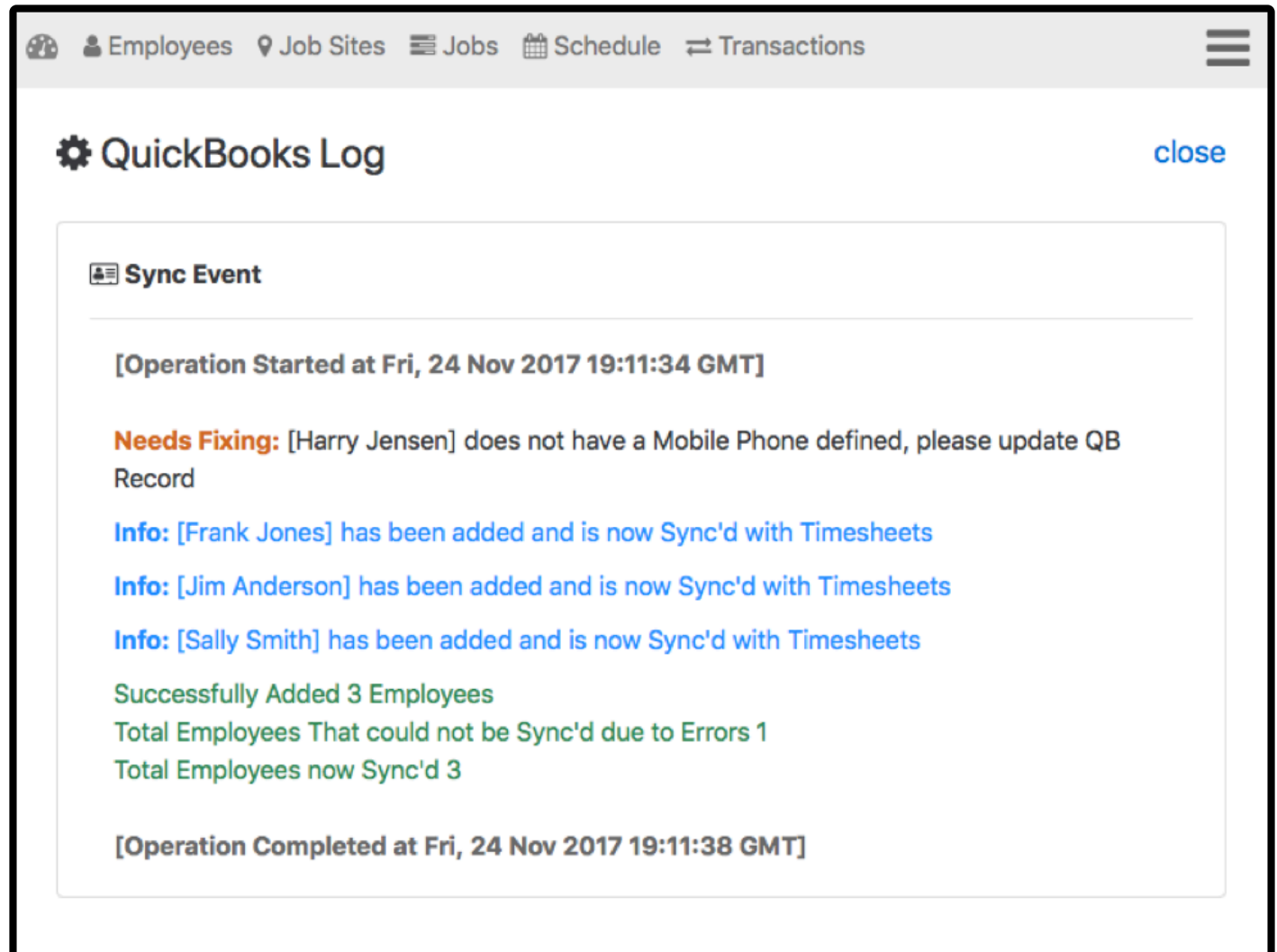
You must import employee data before you can export transactions.

3.7.1.1.3. Viewing Import Logs

The most recent event log will be at the top of the page.

Look for error messages and make adjustments as necessary.

The most common issue is that the employee is missing a Mobile phone number entry in QuickBooks Online.



The screenshot displays the 'QuickBooks Log' window within a software interface. At the top, a navigation bar includes icons and labels for 'Employees', 'Job Sites', 'Jobs', 'Schedule', and 'Transactions'. The 'QuickBooks Log' title is accompanied by a gear icon and a 'close' button. The log content is titled 'Sync Event' and provides a detailed summary of a synchronization process. It begins with the start time 'Fri, 24 Nov 2017 19:11:34 GMT' and lists a 'Needs Fixing' error for 'Harry Jensen' due to a missing mobile phone number. It then lists three 'Info' messages confirming the successful sync of 'Frank Jones', 'Jim Anderson', and 'Sally Smith'. A summary section states 'Successfully Added 3 Employees', 'Total Employees That could not be Sync'd due to Errors 1', and 'Total Employees now Sync'd 3'. The log concludes with the completion time 'Fri, 24 Nov 2017 19:11:38 GMT'.

Employees Job Sites Jobs Schedule Transactions

QuickBooks Log [close](#)

Sync Event

[Operation Started at Fri, 24 Nov 2017 19:11:34 GMT]

Needs Fixing: [Harry Jensen] does not have a Mobile Phone defined, please update QB Record

Info: [Frank Jones] has been added and is now Sync'd with Timesheets

Info: [Jim Anderson] has been added and is now Sync'd with Timesheets

Info: [Sally Smith] has been added and is now Sync'd with Timesheets

Successfully Added 3 Employees

Total Employees That could not be Sync'd due to Errors 1

Total Employees now Sync'd 3

[Operation Completed at Fri, 24 Nov 2017 19:11:38 GMT]

3.7.1.1.4. Importing Customers & Service Items

Optional: You can import Customer and Service Item information from QuickBooks Online. This Customer and Service Item data can then be associated with Telephone Timesheets Jobs.

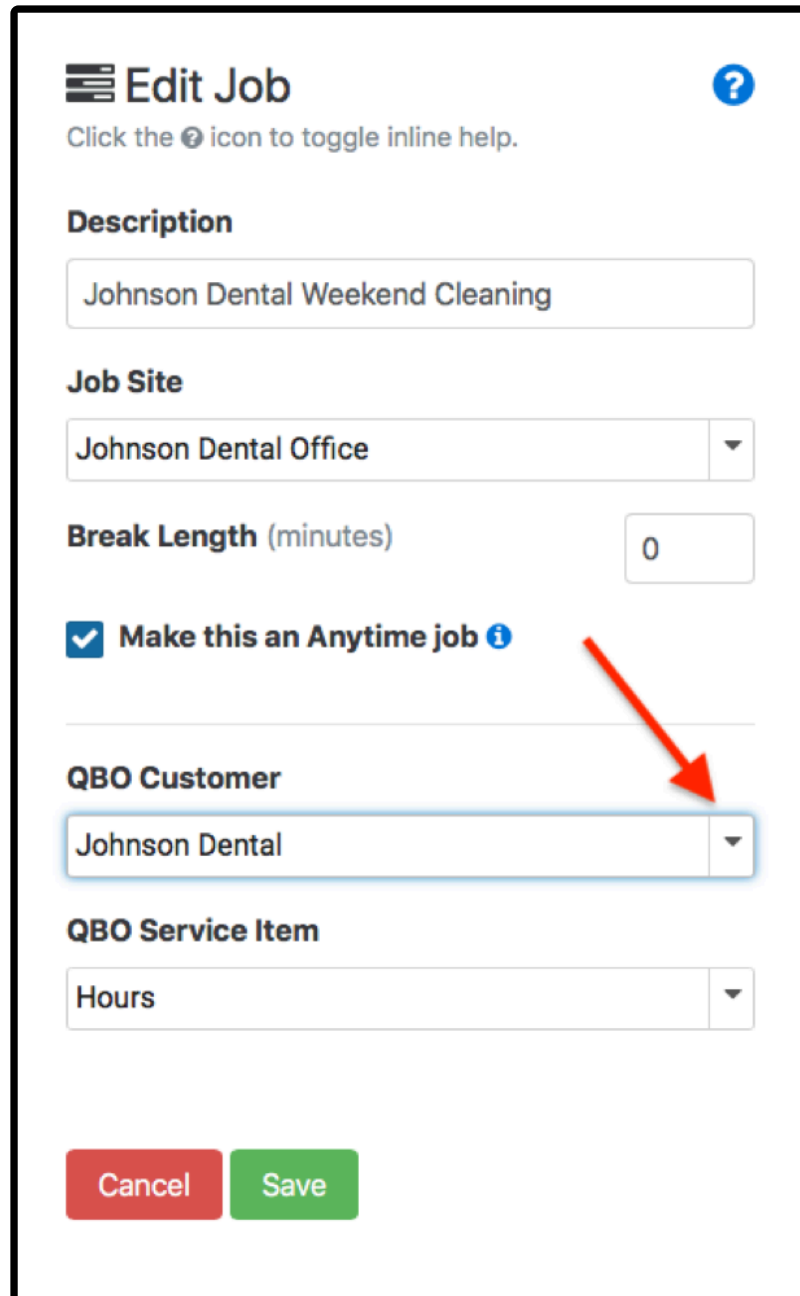
The screenshot displays the 'Settings' page of the Telephone Timesheets application. At the top, a navigation bar includes icons and labels for 'Employees', 'Job Sites', 'Jobs', 'Schedule', and 'Transactions'. The 'Settings' section is titled with a user icon and a help button. Below this, a 'QuickBooks' section is highlighted with a green 'Edit' button. The section contains four rows of data import/export options, each with a green button, a 'Last import/export on' timestamp, and a 'View Log' button. Red arrows point to the 'Import Customer Data' and 'Import Service Item Data' buttons. The 'Export Transaction Data' button is also visible.

QuickBooks	Last import on:
Import Employee Data	Fri. Nov. 24th, 2017 at 2:51: PM
View Log (No Errors)	
Import Customer Data	Fri. Nov. 24th, 2017 at 2:51: PM
View Log (No Errors)	
Import Service Item Data	Fri. Nov. 24th, 2017 at 2:51: PM
View Log (No Errors)	
Export Transaction Data	Ready for initial sync

3.7.1.1.5. Associating Customers & Service Items To Jobs

To associate QuickBooks Customer and Service Item data with a Job, use the Edit Job form as shown below.

This form can be found in the Jobs section of the Telephone Timesheets admin portal.



Edit Job ?

Click the ? icon to toggle inline help.

Description

Johnson Dental Weekend Cleaning

Job Site

Johnson Dental Office ▼

Break Length (minutes)

0

☒ **Make this an Anytime job** i

QBO Customer

Johnson Dental ▼

QBO Service Item

Hours ▼

Cancel **Save**

3.7.1.1.6. Exporting Time Entries

To export timesheet data from Telephone Timesheets to QuickBooks Online, click on the Export Time Entry Data button.

Note: Once Time Entries have been exported, they can no longer be edited within the Telephone Timesheets admin portal.

So, be sure to look through all of the Time Entries first, and make any edits before you export them to QuickBooks Online.

After the export is complete, you will have to make any edits to employee timesheet entries, directly within QuickBooks Online.

!{IMAGE-LINK+qbo-export-time entries}!

3.7.1.1.7. Delete QuickBooks Online Integration

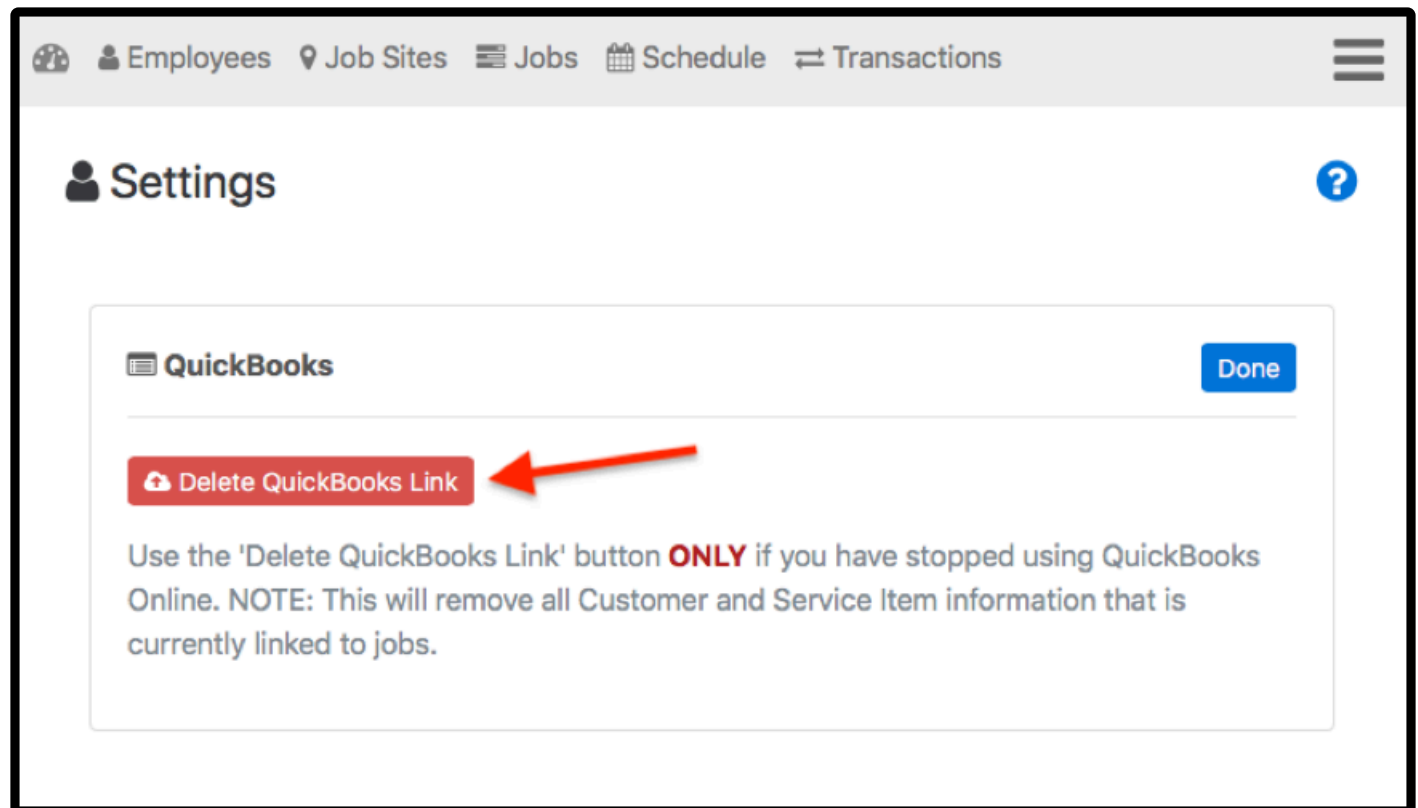
If you decide to stop using QuickBooks Online, or just wish to stop using the integration between Telephone Timesheets and QuickBooks Online, you can remove the integration by clicking on the Edit button.

The screenshot shows the 'Settings' page of the Telephone Timesheets application. At the top, there is a navigation bar with icons and labels for 'Employees', 'Job Sites', 'Jobs', 'Schedule', and 'Transactions'. Below this, the 'Settings' section is displayed with a user icon and a question mark icon. The main content area is titled 'QuickBooks' and contains four rows of integration settings. Each row has a green button with a cloud icon and a label: 'Import Employee Data', 'Import Customer Data', 'Import Service Item Data', and 'Export Transaction Data'. To the right of each button is the text 'Last import on:' followed by the date and time 'Fri. Nov. 24th, 2017 at 2:14: PM'. A red arrow points to the 'Edit' button located to the right of the 'QuickBooks' header. Below each 'Last import on:' text is a blue question mark icon. At the bottom of each row is an orange button labeled 'View Log (No Errors)'.

Integration Type	Last Action	Action
Import Employee Data	Last import on: Fri. Nov. 24th, 2017 at 2:14: PM	View Log (No Errors)
Import Customer Data	Last import on: Fri. Nov. 24th, 2017 at 2:14: PM	View Log (No Errors)
Import Service Item Data	Last import on: Fri. Nov. 24th, 2017 at 2:14: PM	View Log (No Errors)
Export Transaction Data	Last export on: Fri. Nov. 24th, 2017 at 2:14: PM	View Log (No Errors)

This exposes a Delete QuickBooks Link button. Click this button to permanently remove the QuickBooks Online integration.

Note: You can recreate the QuickBooks Online integration again later; however, you will have to re-enter any Customer Data or Service Item Data that you had previously associated with Telephone Timesheets Jobs.



3.7.1.2. QuickBooks Desktop

QuickBooks Desktop integration makes payroll easy.

Telephone Timesheets imports your employee information, as well as customer data and service items from QuickBooks Desktop through a special files that you create within the QuickBooks Desktop client.

In addition, Telephone Timesheets exports timesheet entries directly to QuickBooks Desktop via a [QuickBooks Desktop Export](#) file.

To get started with QuickBooks Desktop integration, go to the [Setup Integration](#) section of the manual.

3.7.1.2.1. Setup Integration

QuickBooks Desktop software integration consists entirely of the transfer of files between Telephone Timesheets and the computer you use to run QuickBooks Desktop. The file transfer happens in two directions, using two different files.

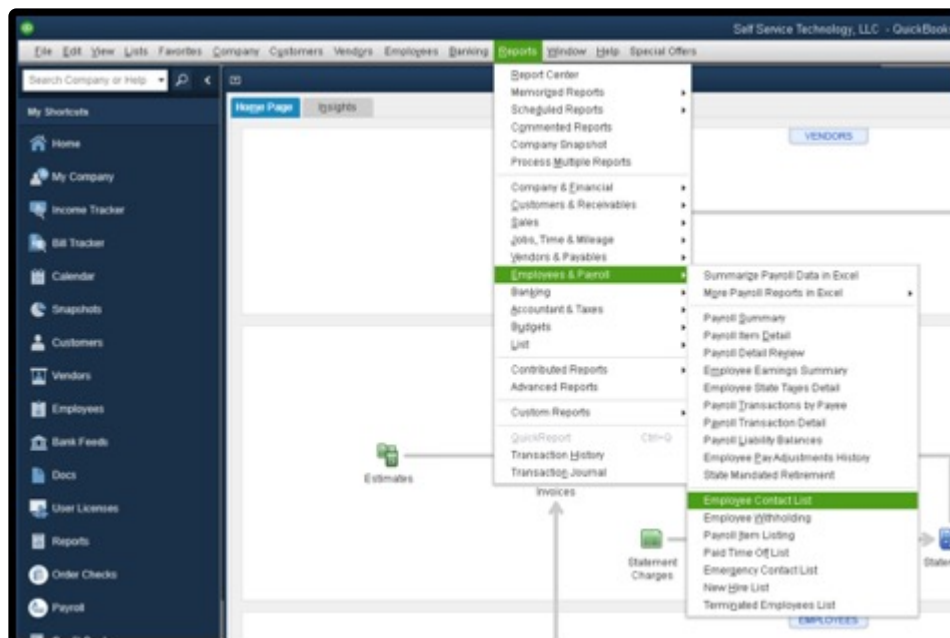
1. **The QuickBooks Desktop List file.** This file is created from within your QuickBooks Desktop software. This file contains information about your employees, customers, and service items. The process for creating this file is documented in the [Creating Your QuickBooks Timer List File](#) section of the manual.
2. **The QuickBooks Desktop Export Report.** This file is created from within the Telephone Timesheets administrative portal. It created in the Reports section of the administrative portal, and is documented [here](#).

In addition, you can do an import of your employees to avoid manually entering each employee into Telephone Timesheets. This is documented in the [Importing Employee Data](#) section of the portal.

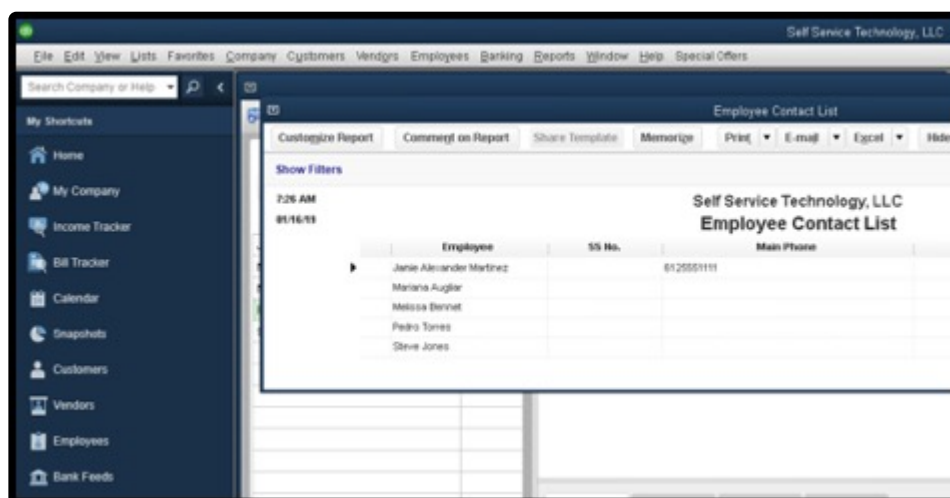
3.7.1.2.2. Importing Employee Data

The first step in setting up Telephone Timesheets is to enter each of your employees. This can be done manually through the administrative portal, or it can be done by uploading an Employee Contact List file from QuickBooks.

To create the Employee Contact List file, you need to use the custom report feature of QuickBooks. You can access custom reports by clicking Reports —> Employees & Payroll —> Employee Contact List as shown in the screen shot below.



This will bring up the Modify Report editor window you see here.



Click on the Customize Report option and check **ONLY** the following **required** list items.

- Active Status
- Employee
- First Name
- Last Name
- Mobile

In addition to these required standard list items, we also support the import of two **optional** list items:

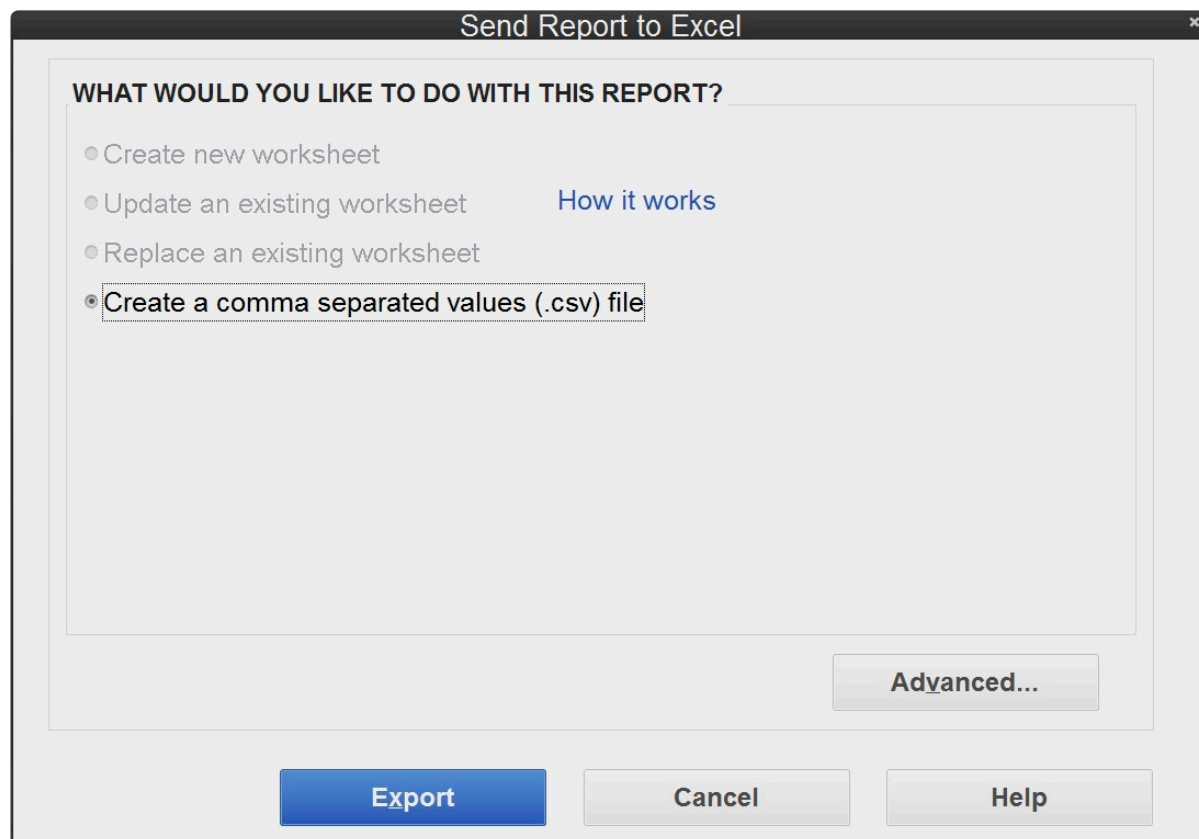
- Date of Birth
- Adjusted Service Date

We also support the import of these **optional** custom list items.

- Union Status
- Spoken Language

Once all of the required and optional list items have been checked, click on the Memorize Report menu to save the report. This will allow you to save all of the customized options for this report for future uploads.

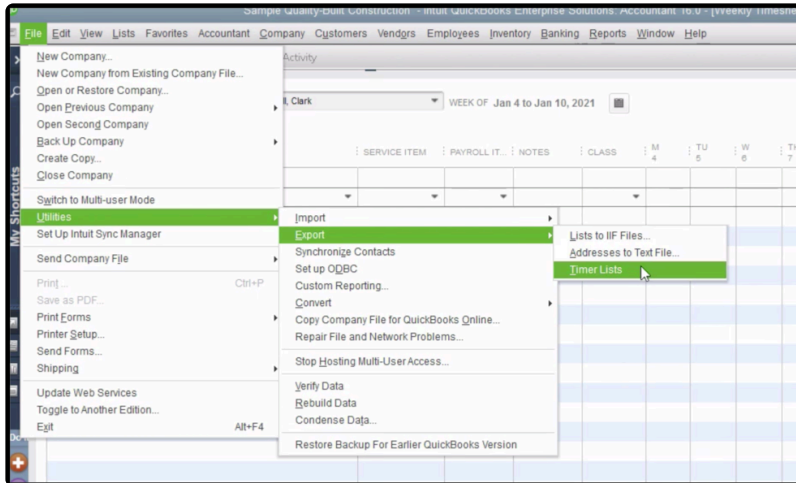
Now that the report is memorized, click on the Excel menu and choose the option to Create a comma separated values (.csv) file as shown in the screen shot below.



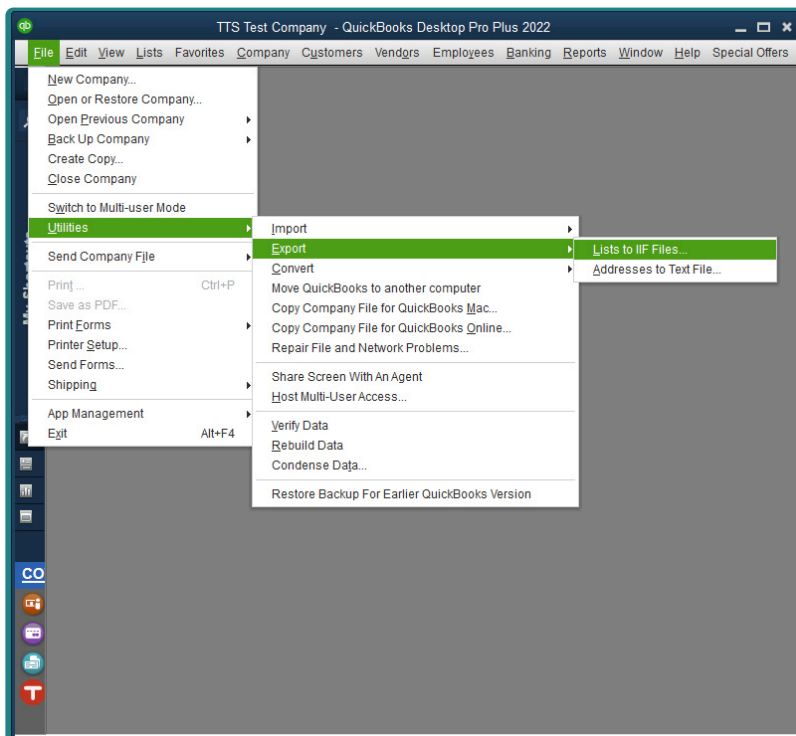
Remember the name and location of this file. You can now upload this report to Telephone Timesheets.

3.7.1.2.3. Uploading QuickBooks Data Into Telephone Timesheets

QuickBooks Desktop software allows you to create a special file that contains employee names, customer data, and service item data. To create this file in QuickBooks, go to File → Utilities → Export → Timer Lists, as shown in the screen shot below.



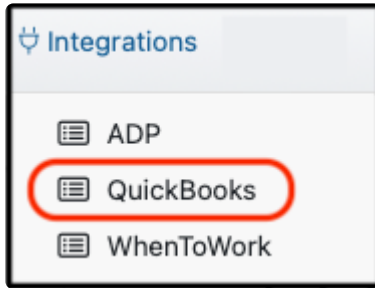
For QuickBooks Desktop 2022 and newer, the menu has changed slightly. Go to File → Utilities → Export → Lists to IIF Files as show here.



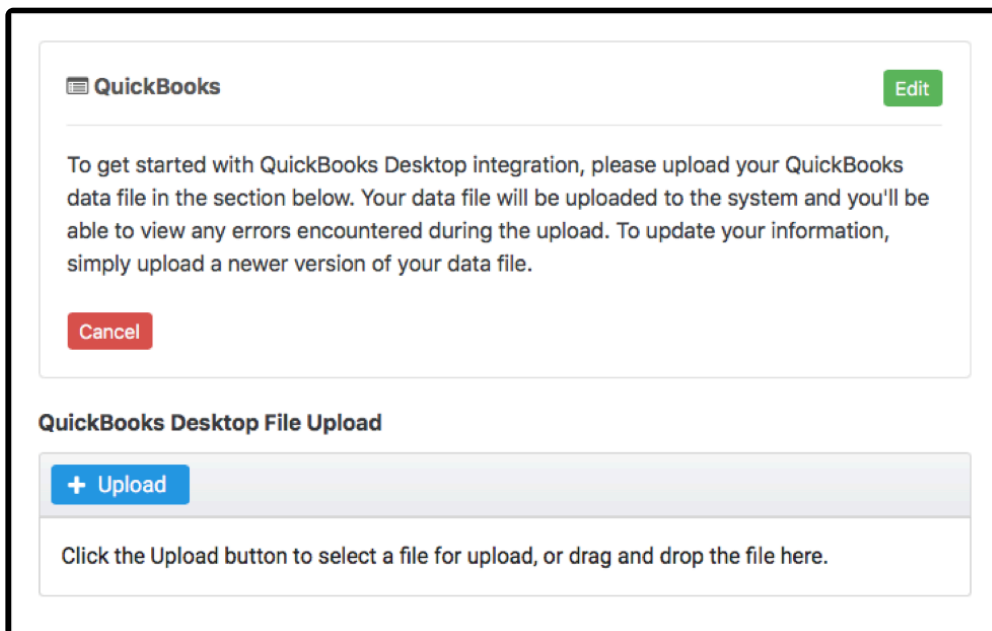
You will need to select 3 types of data. Employees, Customers, and Items. Once you have generated this

file, you can upload it to Telephone Timesheets.

To upload QuickBooks data into Telephone Timesheets, go to Integrations —> QuickBooks.



From there you can either click on the blue Upload button or simply drag-and-drop the file.



✿ Before performing the initial upload of your QuickBooks Timer Lists File you will need to enter all of your employees into Telephone Timesheets. Please see the [Adding Employees](#) section of the manual for instructions on adding employees. If you have a very large number of employees please email support@telephonetimesheets.com for assistance doing a one-time bulk upload.

The initial upload allows our system to match all of the employee names in Telephone Timesheets with the employee names in QuickBooks. If there are names we can't determine a match for, we will notify you in the error log so you can manually correct the mismatch. For example, if you entered the employee as Katherine Johnson in Telephone Timesheets, but they are entered as Katie Johnson in QuickBooks, we would not be able to determine a match and you would have to correct one of the entries, either in Telephone Timesheets or in QuickBooks.

✿ If there is not an exact match between the Telephone Timesheet employee name and the QuickBooks employee name, QuickBooks will not accept timesheet Time Entries for that employee.

In addition to the initial upload, you should perform an upload anytime you make changes to employees, customer data, or service item data in QuickBooks. Each time you upload, you will be presented with a View Log button. It will be highlighted in red if there are any errors. You can click on the View Log button to see those errors.

The screenshot displays the 'QuickBooks Desktop File Upload' interface. At the top left is the 'QuickBooks' logo, and at the top right is a green 'Edit' button. The interface is divided into three main sections: 'Employee Data', 'Customer Data', and 'Service Item Data'. Each section shows the 'Last import on:' date and time (Sun. Feb. 4th, 2018 at 7:38PM) and a 'View Log' button. The 'Employee Data' section has a red 'View Log (3 Errors)' button, while the 'Customer Data' and 'Service Item Data' sections have orange 'View Log (No Errors)' buttons. At the bottom, there is a 'QuickBooks Desktop File Upload' section with a blue '+ Upload' button and a text prompt: 'Click the Upload button to select a file for upload, or drag and drop the file here.'

The most recent event log will be at the top of the page.
Look for error messages and make adjustments as necessary.

 QuickBooks Log Sync Event

[Operation Started at Mon, 29 Jan 2018 22:42:26 GMT]

Needs Fixing: [Bill Gates] Does not exist in Timesheets, please create Timesheets user

Needs Fixing: [Kaitlyn Carter] with mobile [5756400293] does not exist in QB, please add in QB or transaction uploads will fail

Needs Fixing: [8174019025_AutoCreated] with mobile [8174019025] does not exist in QB, please add in QB or transaction uploads will fail

Needs Fixing: [Dude] with mobile [6122260726] does not exist in QB, please add in QB or transaction uploads will fail

Needs Fixing: [Wendy Jensen] with mobile [6129103350] does not exist in QB, please add in QB or transaction uploads will fail

Info: [Steve Jensen] is already Sync'd with Timesheets

Total Employees That could not be Sync'd due to Errors 5

Total Employees now Sync'd 1

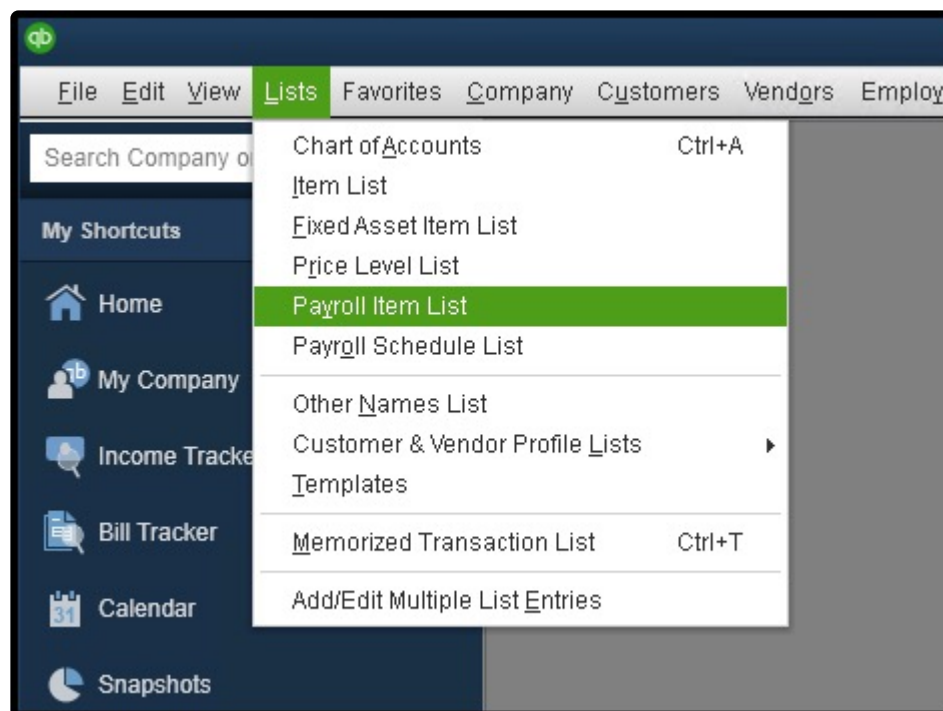
[Operation Completed at Mon, 29 Jan 2018 22:42:28 GMT]

3.7.1.2.4. Entering QuickBooks Payroll Items In Telephone Timesheets

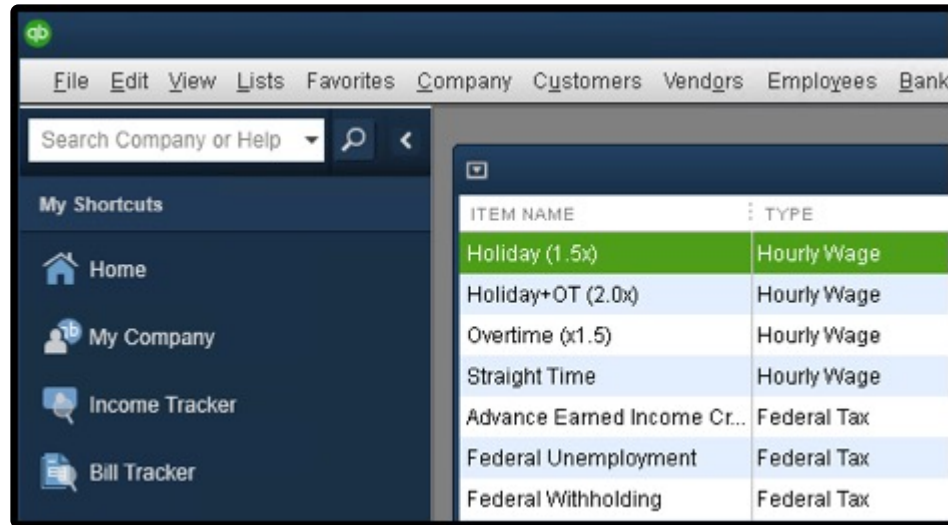
Telephone Timesheets has the ability to break down the hours worked by each employee into 4 categories:

1. Regular Hours
2. Overtime Hours (anything over 40 hours per week)
3. Holiday Hours (any hours worked during a US Federal Holiday)
4. Holiday + Overtime Hours (any hours worked over 40 **and** on a US Holiday)

If you only pay for regular hours, there is no need to take any action. However, if you use Payroll Items in QuickBooks to pay employees different rates for things like overtime and holidays, you can map those Payroll Items to the associated categories in Telephone Timesheets. You can view the Payroll Items in QuickBooks by clicking on Lists —> Payroll Item List menu as shown below.



Make note of the Payroll Item names you see in the Payroll Items List. You will need to enter the exact names you use in QuickBooks.



You can now enter each of the corresponding Payroll Items into the corresponding categories in Telephone Timesheets.

QuickBooks Desktop Payroll Items

Telephone Timesheets has the ability to break down employee hours into the 4 categories you see here. If you use QuickBooks Payroll Items to break down pay by any of these categories, you will need to enter the **exact** names that you use in QuickBooks (including capitalization). It is critical that these mappings are done correctly. Please contact support if you have any questions.

Note: You must enter your Payroll Items in the order listed. Some fields depend on other fields and will be grayed out if the dependent field is empty. Leave blank to use system defaults.

1) Regular

2) Overtime

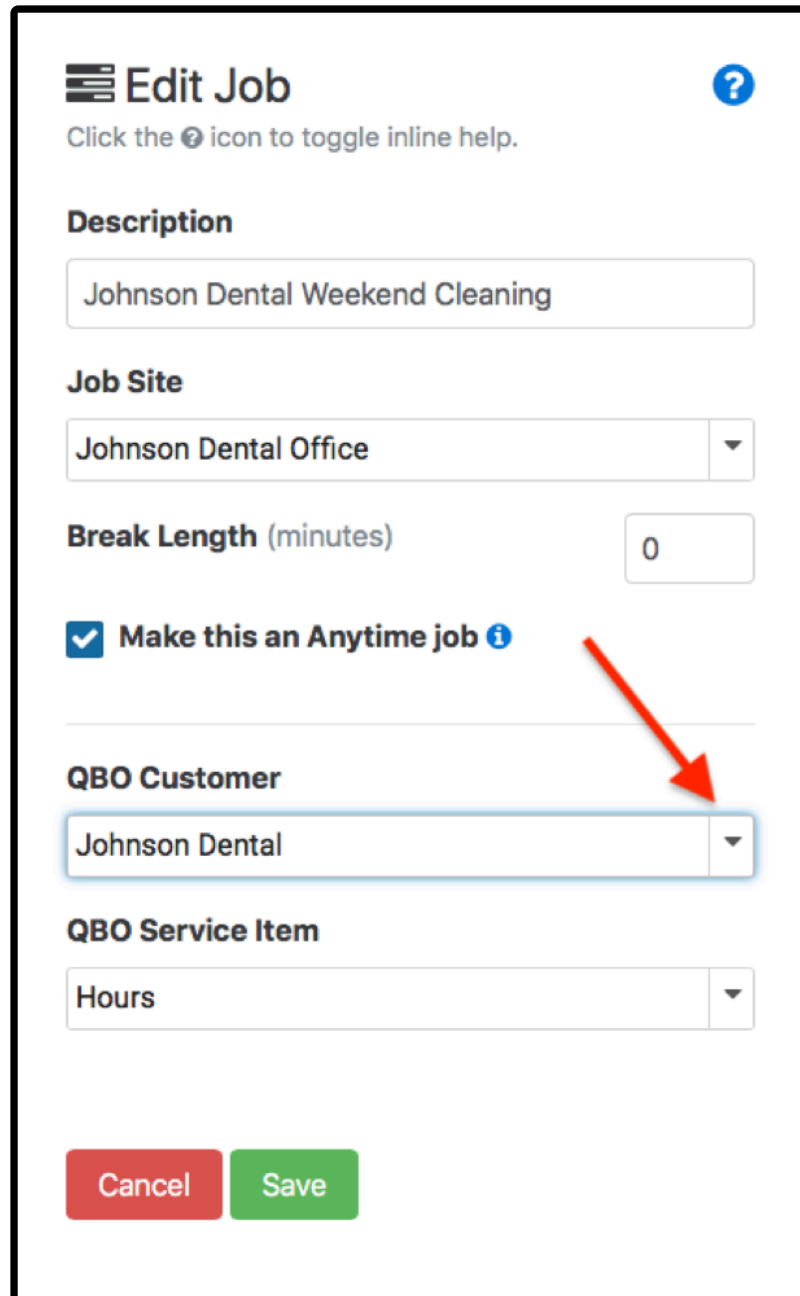
3) Holiday

4) Holiday + Overtime

3.7.1.2.5. Associating Customers & Service Items To Jobs

To associate QuickBooks Customer and Service Item data with a Job, use the Edit Job form as shown below.

This form can be found in the Jobs section of the Telephone Timesheets admin portal.



Edit Job ?

Click the ? icon to toggle inline help.

Description

Johnson Dental Weekend Cleaning

Job Site

Johnson Dental Office ▼

Break Length (minutes)

☒ **Make this an Anytime job** i

QBO Customer

Johnson Dental ▼

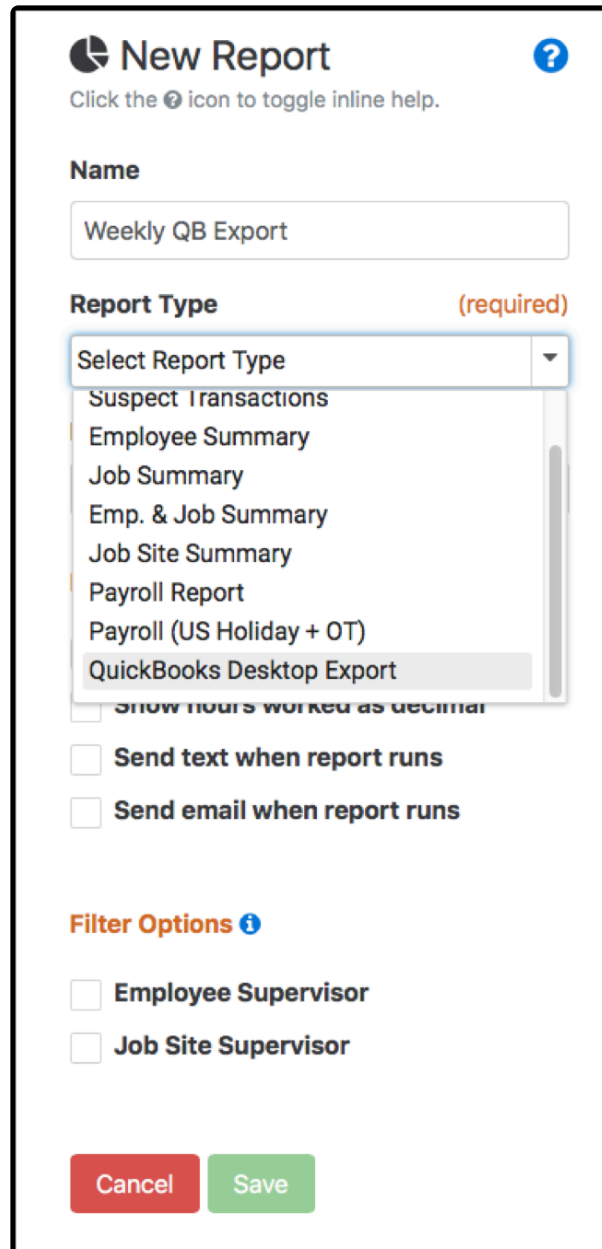
QBO Service Item

Hours ▼

Cancel **Save**

3.7.1.2.6. Importing Time Entries Into QuickBooks Desktop

Exporting Time Entries from Telephone Timesheets is done through the Reports section of the administrative portal. In order to perform an export, simply create and run a report with the report type set to QuickBooks Desktop Export, as shown below.



New Report ?

Click the ? icon to toggle inline help.

Name

Weekly QB Export

Report Type (required)

Select Report Type ▼

- Suspect Transactions
- Employee Summary
- Job Summary
- Emp. & Job Summary
- Job Site Summary
- Payroll Report
- Payroll (US Holiday + OT)
- QuickBooks Desktop Export

☐ Show hours worked as decimal

☐ Send text when report runs

☐ Send email when report runs

Filter Options ?

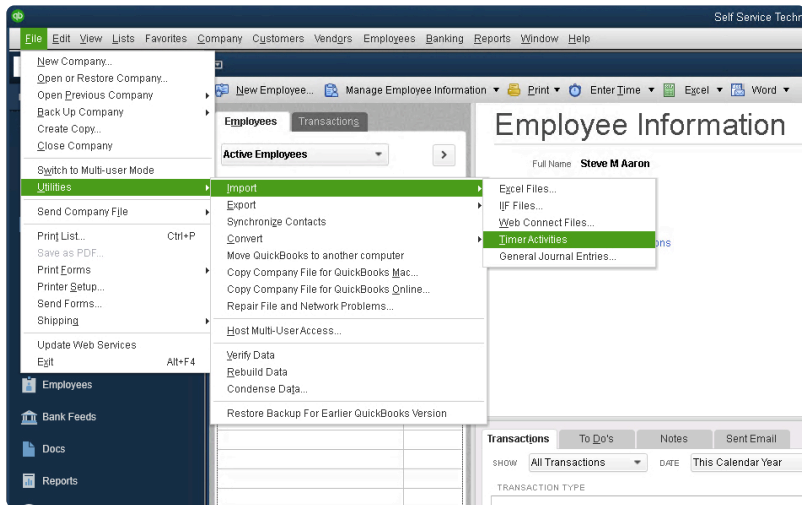
☐ Employee Supervisor

☐ Job Site Supervisor

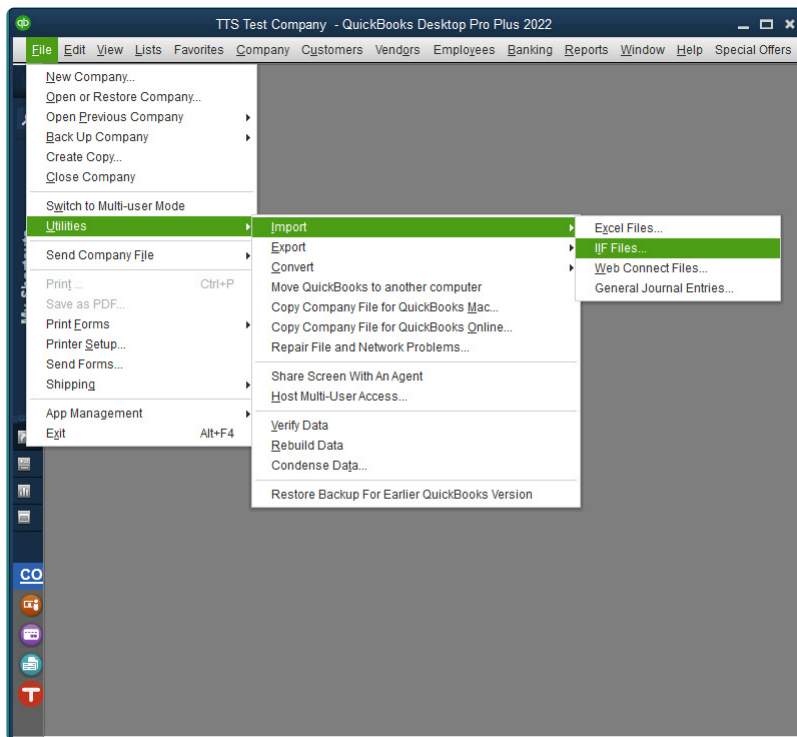
Cancel **Save**

As a best practice, time entries should be exported according to your payroll period. You can easily verify your payroll data by first creating a standard Payroll Report, and reviewing it for any issues. It is important that you examine the payroll data and correct any errors. Once you have verified all of the time entries, you are ready to create a QuickBooks Desktop Export file. The process to create this file in Telephone Timesheets is documented [here](#).

After completing the export from Telephone Timesheets to your computer, you are now ready to import timesheet Time Entries into QuickBooks Desktop software. To do this, go to File —> Utilities —> Import —> Timer Activities, as shown in the screen shot below.



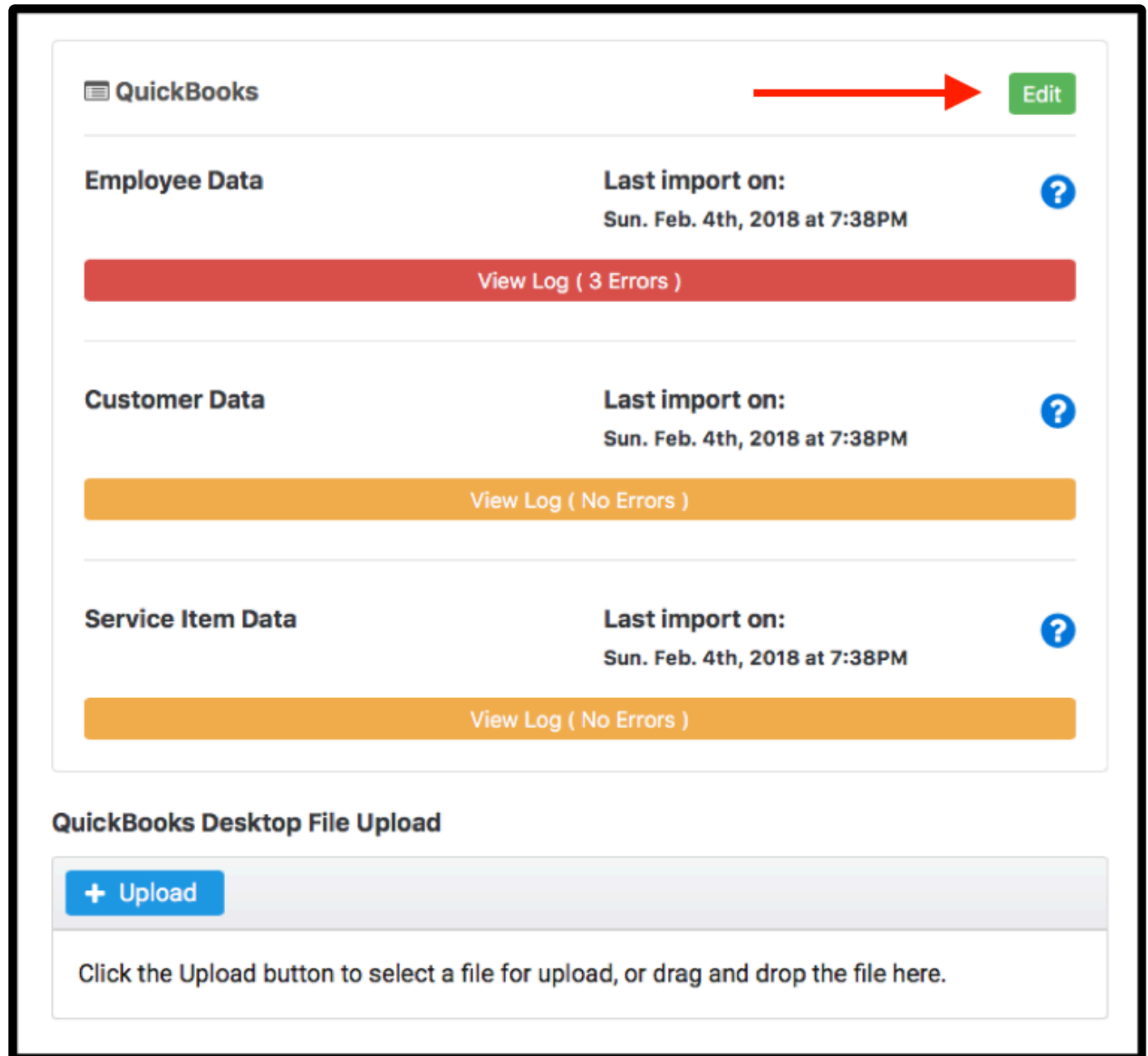
For QuickBooks Desktop 2022 and newer, the menu has changed slightly. Go to File —> Utilities —> Import —> IIF Files as show here.



This will prompt you to select the file that you just downloaded. The filename will start with “QBTimerListImport” and will include the date range for the report. Upon completion of the import, you will have all of the timesheet entries in QuickBooks Desktop, including associated customer data and service item data. You are now ready to use this imported timesheet data to run payroll and create reports within QuickBooks.

3.7.1.2.7. Delete QuickBooks Desktop Integration

If you decide to stop using QuickBooks Desktop, or just wish to stop using the integration between Telephone Timesheets and QuickBooks Desktop, you can remove the integration by clicking on the Edit button.



QuickBooks [Edit](#)

Employee Data Last import on: Sun. Feb. 4th, 2018 at 7:38PM [?](#)

[View Log \(3 Errors \)](#)

Customer Data Last import on: Sun. Feb. 4th, 2018 at 7:38PM [?](#)

[View Log \(No Errors \)](#)

Service Item Data Last import on: Sun. Feb. 4th, 2018 at 7:38PM [?](#)


[View Log \(No Errors \)](#)

QuickBooks Desktop File Upload

[+ Upload](#)

Click the Upload button to select a file for upload, or drag and drop the file here.

This exposes a Delete QuickBooks Link button. Click this button to permanently remove the QuickBooks Desktop integration.

 **QuickBooks**

Done

Delete QuickBooks Link

Use the 'Delete QuickBooks Link' button **ONLY** if you have stopped using QuickBooks.
Note: This will remove all Customer and Service Item information that is currently linked to jobs.

QuickBooks Desktop File Upload

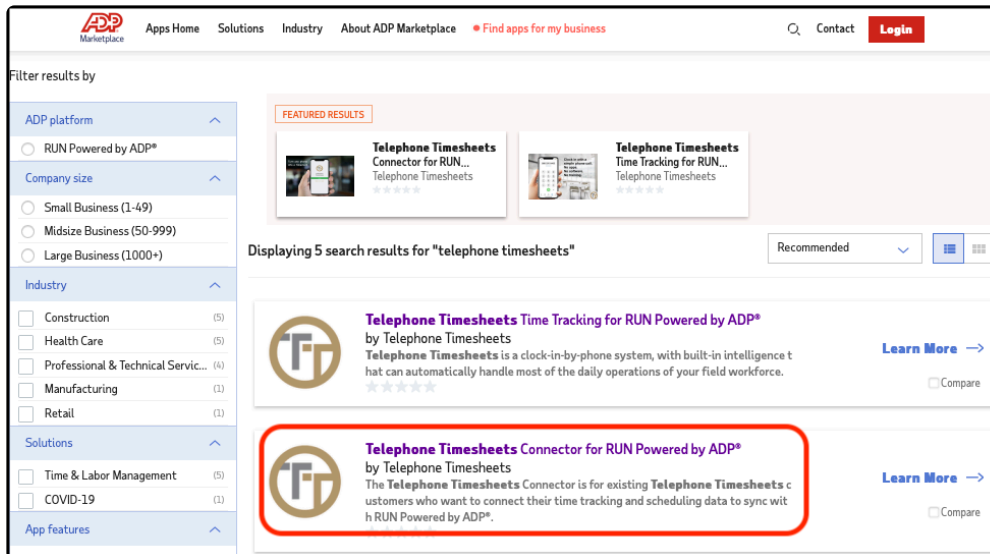
+ Upload

Click the Upload button to select a file for upload, or drag and drop the file here.

Note: You can recreate the QuickBooks Desktop integration again later; however, you will have to re-enter any Customer Data or Service Item Data that you had previously associated with Telephone Timesheets Jobs.

3.7.2. ADP

Telephone Timesheets integrates directly with ADP Workforce Now® and RUN Powered by ADP®. We are available through the ADP Marketplace.



Here's how it works:

Once the [integration is established](#), a bi-directional data transfer can occur between Telephone Timesheets and ADP. This allows Telephone Timesheets to import and synchronize with your ADP employee data. It also allows you to setup your payroll earnings and rates so they can be attached to Jobs in Telephone Timesheets. Finally, it will allow you to export hours worked data for your next payroll.

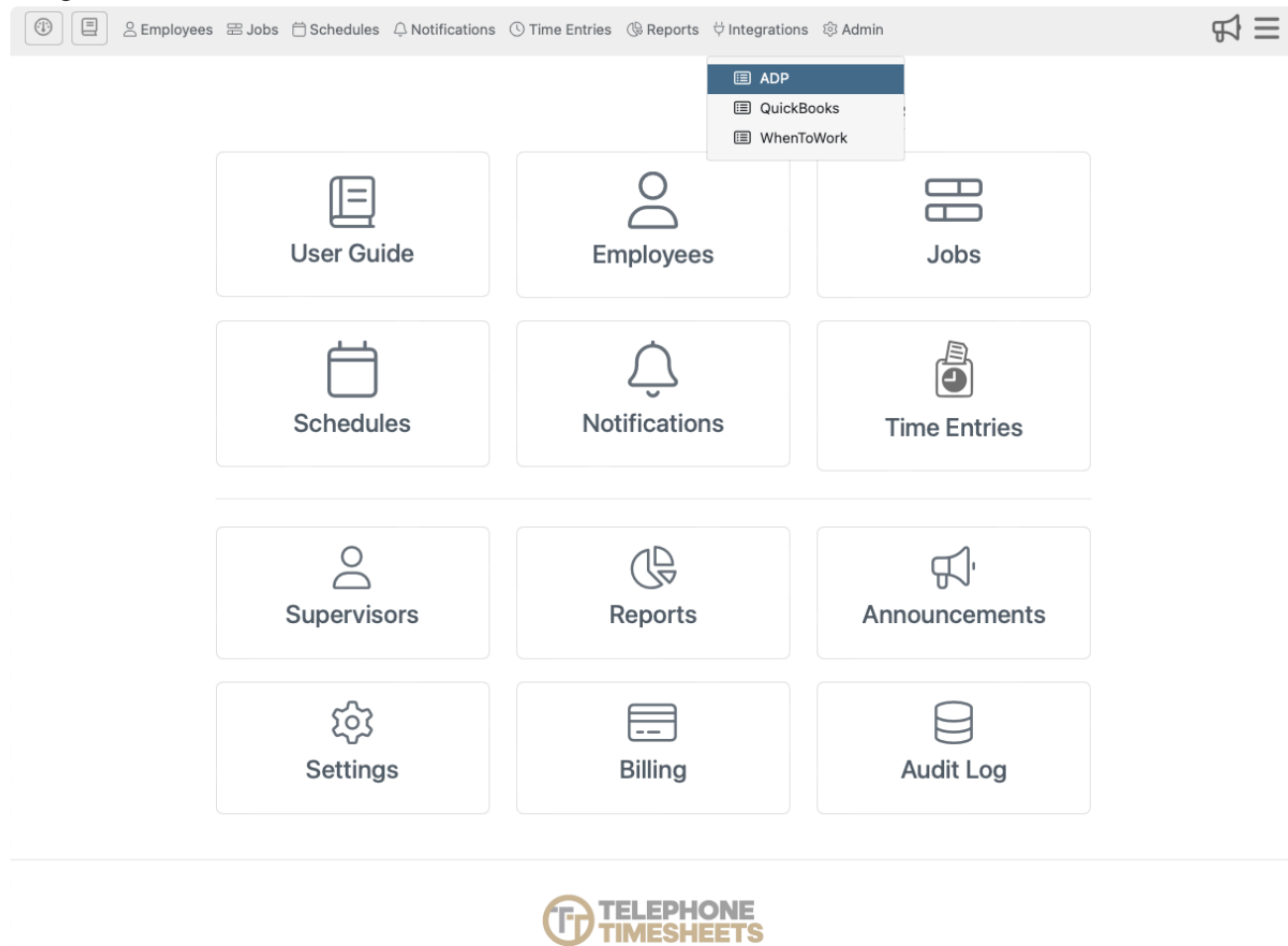
3.7.2.1. Setup Integration

Here are step-by-step instructions for setting up the integration. The entire process only takes a couple minutes, but if you would like us to walk you through it, don't hesitate to reach out and setup a call. We'd be happy to take you through the steps and answer any questions you might have.

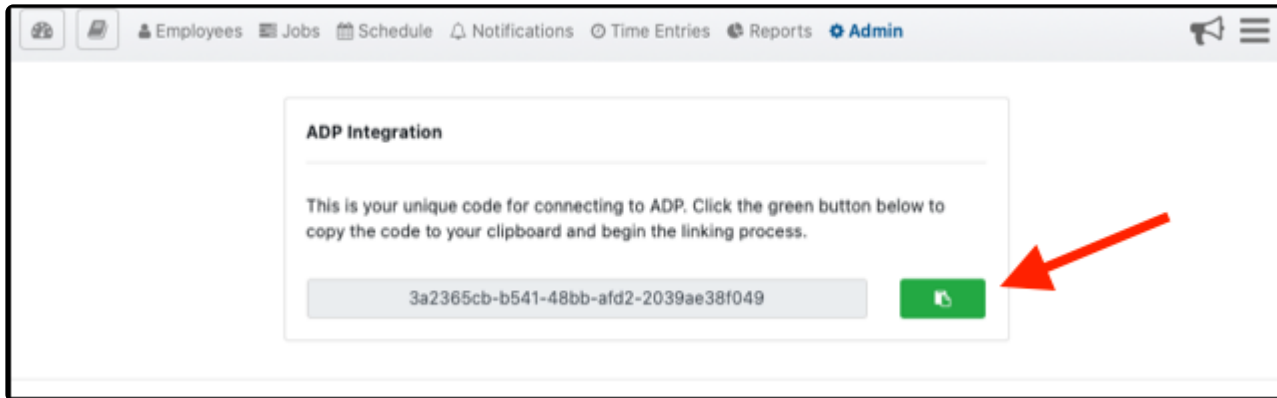
Step 1: You must first log in to the ADP Marketplace using your ADP credentials.

<https://apps.adp.com/en-US/home>

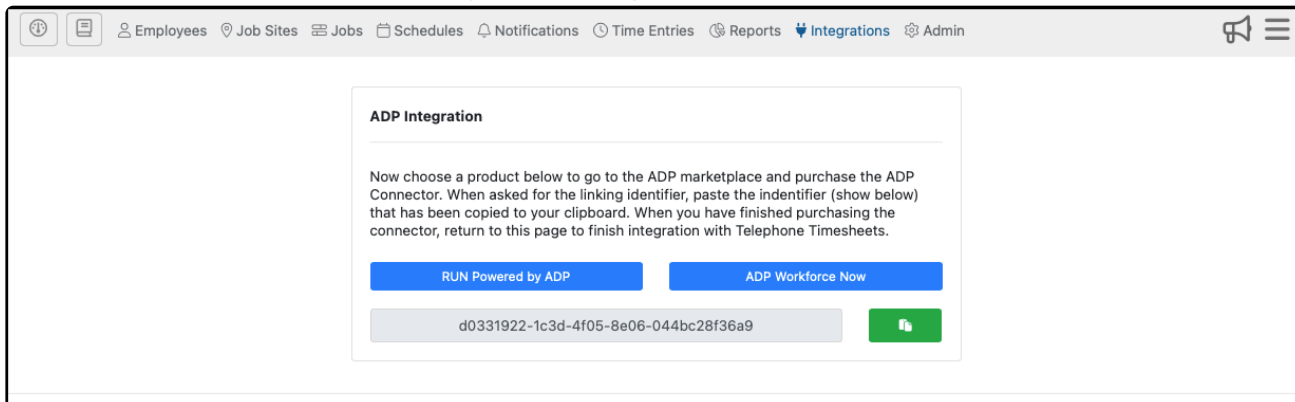
Step 2: Open a new tab in your browser and go to the ADP page in Telephone Timesheets under Integrations —> ADP as shown here.



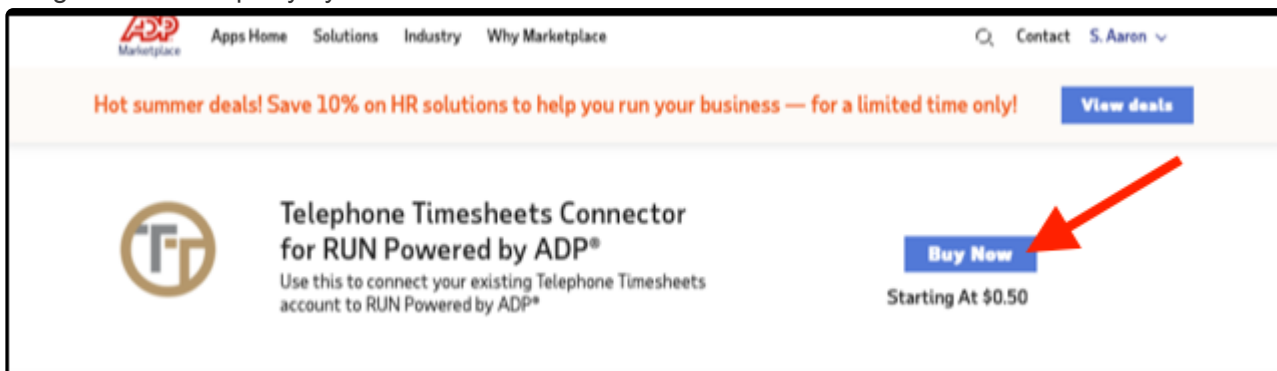
Step 3: Click on the green clipboard to copy the integration code and begin the integration process.



Step 4: Choose the version of ADP you are using.



Step 5: Click the “Buy Now” button at the top of the ADP Marketplace listing for the Telephone Timesheets Connector. Note: ADP charges 50 cents per user. Telephone Timesheets does not charge anything for integration to 3rd-party systems. Ever.



Step 6: Click “Continue”

ADP Marketplace Apps Home Solutions Industry Why Marketplace

1. Create Order 2. Additional Information 3. Billing Details 4. Confirm Order 5. Order Receipt

You're 60 seconds away from getting Telephone Timesheets Connector for RUN Powered by ADP®. [Purchase FAQs](#)

Included Users

Telephone Timesheets	1	\$0.00 / Mo * \$0.50 / Employee Based on Usage
----------------------	---	--

Discount Code: [Apply](#)

Fee due at checkout: \$0.00
Final price may include additional taxes.

Total recurring monthly fee as of 09/29/21: \$0.00
Recurring monthly fees may include charges based on usage.

[Back to Telephone Timesheets Connector for RUN Powered by ADP*](#) [CONTINUE](#)

Step 7: Paste the code that was copied in step 3 when you clicked on the green clipboard in Telephone Timesheets. Then click the “Check” button.

ADP Marketplace Apps Home Solutions Industry Why Marketplace

1. Create Order 2. Additional Information 3. Billing Details 4. Confirm Order 5. Order Receipt

Product Settings

TELEPHONE TIMESHEETS ADP CONNECTOR -

ADP Integration Identifier

3a2365cb-b541-48bb-afd2-2039ae38f04

Please enter the ADP Identifier found in the TTS Admin -> ADP Page

[Check](#)

[Cancel](#) [CONTINUE](#)

Step 8: Click “Continue”

ADP Marketplace Apps Home Solutions Industry Why Marketplace

Search Contact S. Aaron

1. Create Order 2. Additional Information 3. Billing Details 4. Confirm Order 5. Order Receipt

Valid Company Identifier
The Company ADP Integration identifier is correct

Product Settings

TELEPHONE TIMESHEETS ADP CONNECTOR -

ADP Integration Identifier
3a2365cb-b541-48bb-afd2-2039ae38f04
Please enter the ADP Identifier found in the TTS Admin -> ADP Page

Check

Cancel CONTINUE

Step 9: Enter billing information and click continue.

ADP
Marketplace

Apps Home Solutions Industry Why Marketplace

🔍 Contact S. Aaron ▾

1. Create Order

2. Additional Information

3. Billing Details

4. Confirm Order

5. Order Receipt

Complete Billing Details

Select a Payment Method

Card ending in

Edit

Edit Card

Billing Contact

Street Address / PO Box*

City*

Country* United States ▾

State / Province* Minnesota ▾


Postal / Zip Code*

Phone Number*

Credit Card Details

Name*

Exactly as it appears on card



Credit Card No.*

Please use the format: XXXX XXXX XXXX XXXX

Expiration Date* 11 ▾ 2022 ▾

Security Code*

The security code is the last 3 digits on the back of your card, or each half of the 4 digits on the front of the card

Back

(You can review this order before it's final.)

CONTINUE

Step 10: Check the Terms of Service box and click “Place Order”

ADP Marketplace Apps Home Solutions Industry Why Marketplace Search Contact S. Aaron

1. Create Order 2. Additional Information 3. Billing Details 4. **Confirm Order** 5. Order Receipt

Confirm Order

Bill To:

912 Westlyn Court
Farmington MN 55024
United States

Payment Method:

Card ending in 0419


Name	Edition	Price	Quantity	Total
Telephone Timesheets Connector for RUN Powered by ADP*	Telephone Timesheets	\$0.00 / Month	1	\$0.00

Subtotal: \$0.00
Sales Tax: \$0.00
Fee due at checkout: \$0.00

Total recurring monthly fee as of 09/30/21: \$0.00
Recurring monthly fees may include charges based on usage.

[Back](#) ☒ I have read and agree to the ADP Marketplace Terms of Service and the Terms of Service applicable to each application I am purchasing as shown on [this page](#) **PLACE ORDER**

Step 11: You can now click on GO TO MYAPPS to see the Telephone Timesheets Connector listed along with any other ADP Apps you might have.

 [Apps Home](#) [Solutions](#) [Industry](#) [Why Marketplace](#) [Contact](#) [S. Aaron](#)

[1. Create Order](#) [2. Additional Information](#) [3. Billing Details](#) [4. Confirm Order](#) [5. Order Receipt](#)

Order Receipt


You successfully subscribed to Telephone Timesheets Connector for RUN Powered by ADP® and can start using the application from MyApps. You will receive email confirmations of your purchase.

Order ID: **118827415**

Name	Edition	Price	Quantity	Total
Telephone Timesheets Connector for RUN Powered by ADP®	Telephone Timesheets	\$0.00 / Month	1	\$0.00
Subtotal:				\$0.00
Sales Tax:				\$0.00
Fee paid at checkout:				\$0.00


Total recurring monthly fee as of 09/30/21: \$0.00
Recurring monthly fees may include charges based on usage.

[GO TO MYAPPS](#)


 [Apps Home](#) [Solutions](#) [Industry](#) [Why Marketplace](#) [Contact](#) [S. Aaron](#)

Applications

You successfully subscribed to Telephone Timesheets Connector for RUN Powered by ADP® and can start using the application from your MyApps page. You will receive email confirmations of your purchase. ✕

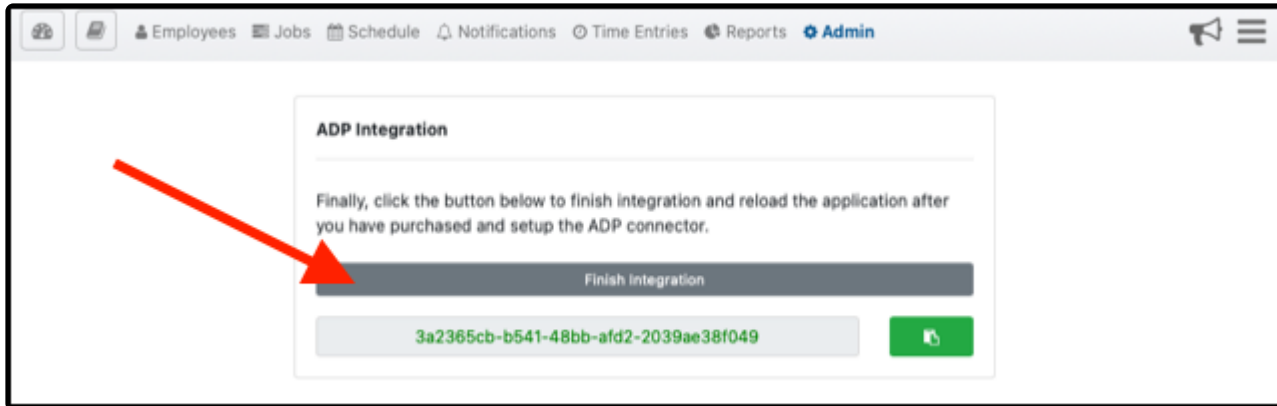


Telephone Timesheets Time Tracking for RUN Powered by ADP®

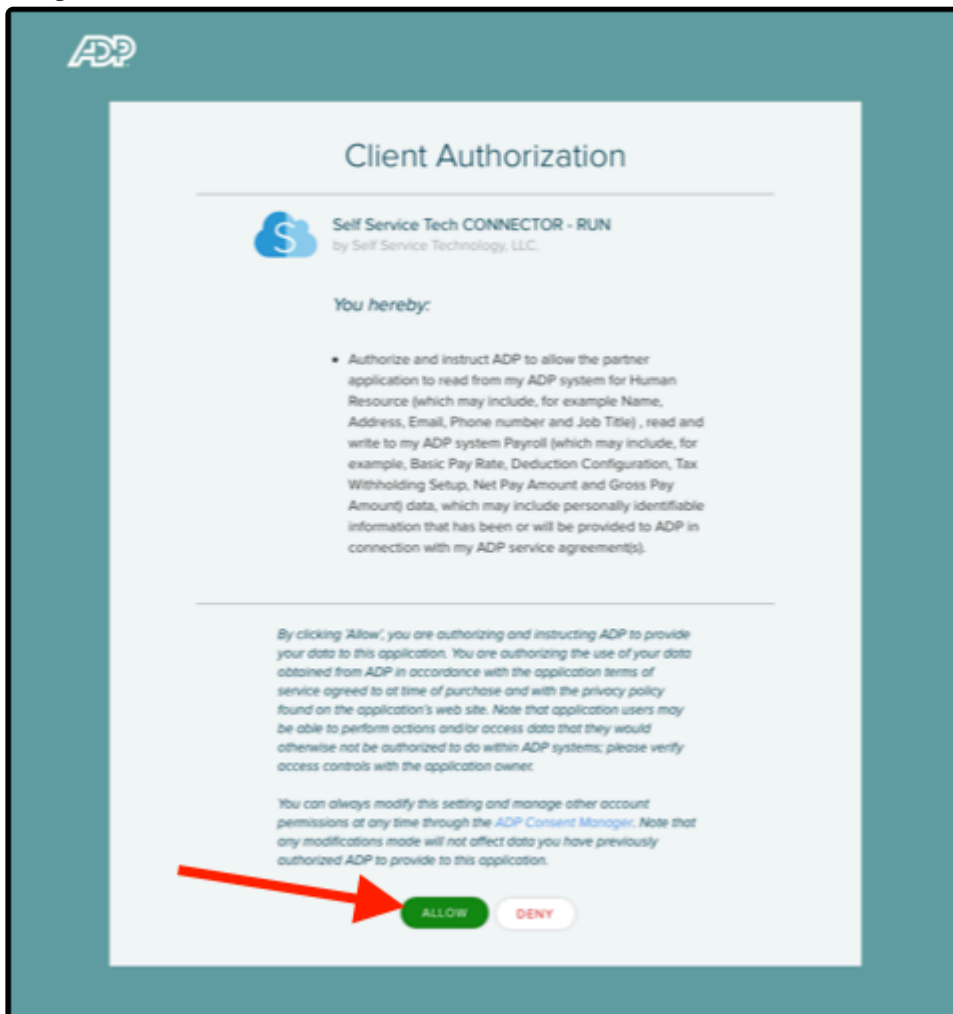


Telephone Timesheets Connector for RUN Powered by ADP®

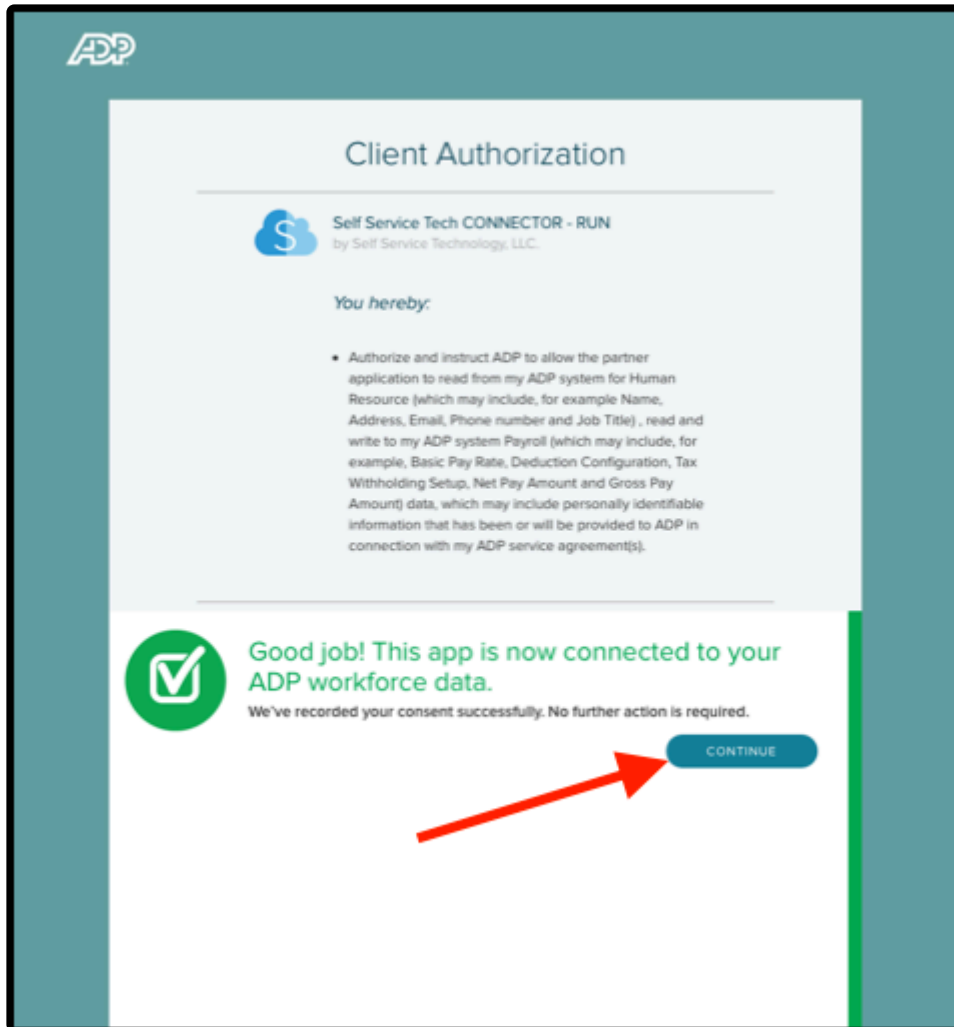
Step 12: Return to the Telephone Timesheets tab in your web browser and click the “Finish Integration” button.



Step 13: This will bring you to the ADP Consent Manager page where you will click on “ALLOW” to finish the integration.



Step 14: Click Continue to finish and return to the Telephone Timesheets ADP integration page.



Congratulations! The ADP Connector for Telephone Timesheets is now in place. You can now import employee data, setup your payroll earnings and rates, and then will be ready to export time entry data for your next payroll.

EmployeesJobsScheduleNotificationsTime EntriesReportsAdmin

ADP Integration

Import Employee Data

Last import on:

View Log (No Errors)

Export Time Entry Data

Last export on:

Awaiting initial export

Please make sure your payroll settings have been properly configured and any changes saved in the [Payroll Earnings and Rates](#) section below.

Select pay cycle option

View Log (No Errors)

Payroll Earnings and Rates

Regular

required

Select earnings code

Holiday

Select earnings code

Overtime

Select earnings code

Overtime + Holiday

Select earnings code

Update Payroll Settings

Copyright © 2017 Telephone Timesheets

Page 141 of 272

3.7.3. When To Work

Integration with [When To Work](#) scheduling is designed for employers who already use When To Work, or have a need for more advanced scheduling capabilities beyond those built in to Telephone Timesheets.

Here are some of the key features of When To Work.

<p>Online Employee Scheduling</p> <p>The most advanced online employee scheduling app software available. Automatically schedule employees based on employee work time preferences.</p> <ul style="list-style-type: none"> • Better employee scheduling • Save time & money • Improve communication • Be better informed • Scheduling with security & flexibility <p>Also included:</p> <ul style="list-style-type: none"> • Automatic email / text notifications • Employee tradeboard • Company bulletin board • FREE mobile employee scheduling app • Employee tracking <p>...all for HALF THE COST of other employee scheduling programs!</p>	<p>Fast & Easy Employee Scheduling</p> <ul style="list-style-type: none"> • Total Control - you choose what employees can do and see online • Increase Efficiency - know coverage and scheduling availability information • Delegate - add scheduling managers & set their scheduling permissions • Better Planning - know your approximate scheduling payroll costs • Convenient - unlimited access from anywhere (nothing to install or upgrade) • Organization - employee time off requests are automatically updated in schedules • Privacy - all information is secure and password protected • Support - online help and fast & effective customer support • No Risk - use it free for 30 days - no credit card or personal information required 	<p>Employees Love W2W Too!</p> <ul style="list-style-type: none"> • Easy - employees automatically receive a unique username and password • Convenient - check employee schedules day or night - no more calling in - instant notifications by email or text of shift changes or new open shifts • Mobile Apps - employees and managers can be informed at all times, even when on the go! • Great Schedules - you can use their work time scheduling preferences to auto assign shifts • Trading Shifts - optional tradeboard included to allow online shift trade • Time Off - can request time off and if approved by manager the schedule is automatically updated • Fair Scheduling - allows employees to enter their prefer and dislike work times
--	---	---

Integration with When To Work allows you to take advantage of the robust scheduling capabilities of When To Work in combination with the time tracking, daily operations, reporting, and notifications system of Telephone Timesheets. Once the integration is established, your When To Work schedules, positions, and categories will automatically synchronize with Telephone Timesheets. No need to maintain schedules in two systems. Maintain your scheduling process in When To Work, and those schedules will always stay in sync with Telephone Timesheets.

3.7.3.1. One-Time Setup Instructions

Step 1. Obtain your integration key from When To Work

To obtain the key, login to the WhenToWork administrative portal and click on the Reports —> 3rd Party Auto Exports menu as shown here.

HOME SCHEDULES EMPLOYEES TRADES TIME OFF MESSAGING REPORTS ON NOW SETTINGS HELP SIGNOUT


Nov 24, 2023
16:28

Telephone Timesheets
3rd Party Software Automation

Custom Reports
3rd Party Manual Exports
3rd Party Auto Exports
Standard Reports

Custom 3rd Party Manual Exports 3rd Party Auto Exports

Sync with Other Third Party Calendar Programs

 **Calendar**
Google Calendar

Export full or part schedules that are automatically updated and can be shared with third parties and used for backup.

Outlook, iPhone
(and most other calendars)

First export to Google Calendar (see above), then from there sync that calendar to your phone, Outlook or other calendars. Help on this topic [More](#)

API - Pro Plan

API

Pro Plan subscribers can use our API to retrieve data from their account. This can be set up by the main manager on their **Settings>Pro Settings** page.



Auto Export to Third Party Timeclock

(Requires subscription to third party software)

Third Party Timeclocks

Any third party timeclock that can pull schedule data from Google Calendar, can be used to automatically update your W2W schedule data in their timeclock system. Ask your timeclock provider if they can pull data from Google Calendar. One such third party provider is listed below.

Pro Plan subscribers can use our API if their current timeclock is able to connect to it.

 **TELEPHONE
TIMESHEETS** 

Existing TT customers - Provide this key to TT:

Copy To Clipboard Show TT Key

W2W Pro Plan Subscribers receive 20% off at TT

Click on the Copy To Clipboard button so you can then paste the key into Telephone Timesheets.

[HOME](#) [SCHEDULES](#) [EMPLOYEES](#) [TRADES](#) [TIME OFF](#) [MESSAGING](#) [REPORTS](#) [ON NOW](#) [SETTINGS](#) [HELP](#) [SIGNOUT](#)Nov 24, 2023
16:28

Telephone Timesheets

3rd Party Software Automatic Exports

[Custom](#)[3rd Party Manual Exports](#)[3rd Party Auto Exports](#)[Standard](#)

Sync with Other Third Party Calendar Programs



Export full or part schedules that are automatically updated and can be shared with third parties and used for backup.

Outlook, iPhone
(and most other
calendars)

First export to Google Calendar (see above), then from there sync that calendar to your phone, Outlook or other calendars. [Help on this topic](#) [More](#)

API - Pro Plan

API

Pro Plan subscribers can use our API to retrieve data from their account. This can be set up by the main manager on their **Settings>Pro Settings** page.

Auto Export to Third Party Timeclock (Requires subscription to third party software)

Third Party Timeclocks

Any third party timeclock that can pull schedule data from Google Calendar, can be used to automatically update your W2W schedule data in their timeclock system. Ask your timeclock provider if they can pull data from Google Calendar. One such third party provider is listed below.

Pro Plan subscribers can use our API if their current timeclock is able to connect to it.



**TELEPHONE
TIMESHEETS** [↗](#)

Existing TT customers - Provide this key to TT:

[Copy To Clipboard](#)[Show TT Key](#)

W2W Pro Plan Subscribers receive 20% off at TT

Step 2. Enter your W2W integration key in Telephone Timesheets

To paste the key into Telephone Timesheets, go to the Integrations —> WhenToWork page.

WhenToWork Integration Done

Paste your WhenToWork Partner Key below. [Click here](#) for instructions on obtaining the API key from the WhenToWork admin portal.

Partner Key (required)

Update

Once the integration is established, you can see any errors that might have occurred by returning to the Integrations —> WhenToWork page.

WhenToWork Integration Edit

No sync errors

Schedule has not yet been synchronized

Auto-Sync Enabled Filter

Sync Error	W2W Entry With Error
No sync issues reported	

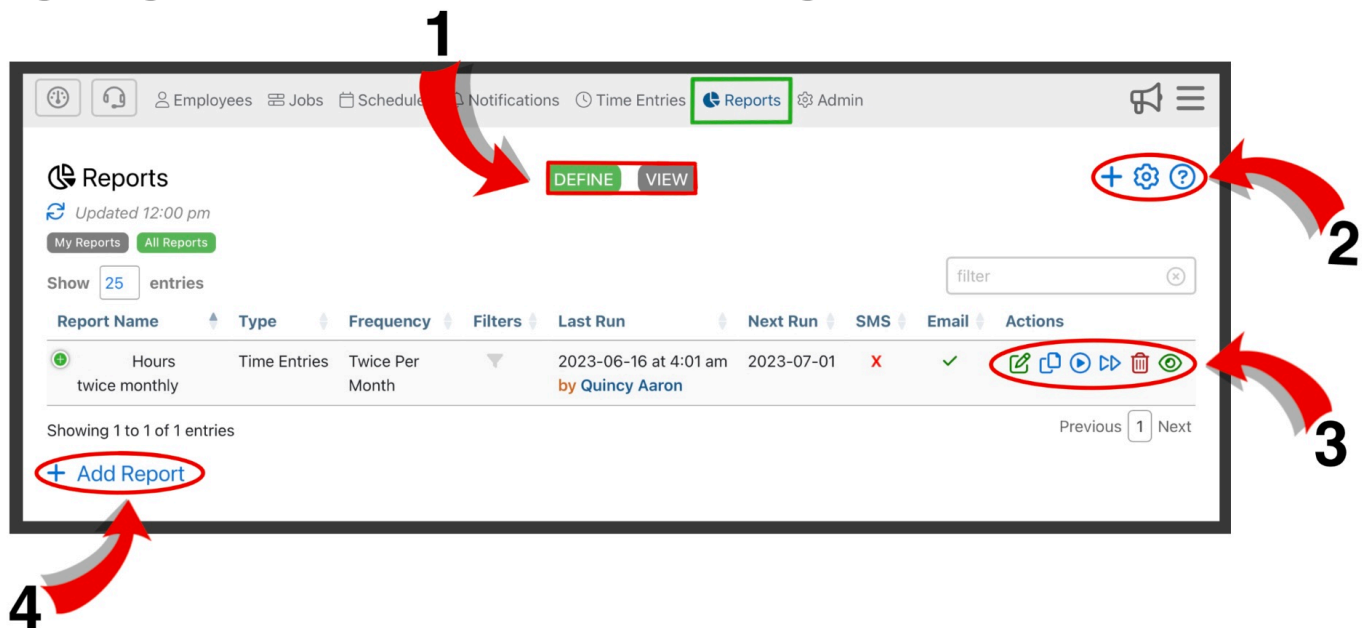
<< < > >> 10 ▼

3.8. Reports




Telephone Timesheets supports a variety of report types. Details on each report type can be found in the [Report Types](#) section of the user manual.




Each time a report is run, it creates a record in the Report History section. You can view past reports and re-run past reports from the history section. This is useful if you make changes in the Time Entry log and wish to re-run a payroll report. It is a best practice to keep an eye on Time Entries regularly and fix up any forgotten check outs, or other issues. Then, when it is time to run payroll reports, your data will be accurate.


Highlights of The Reports Page



1. Reports are organized into 2 different categories; Define and View. The Define tab allows for you to see report settings and details. The View tab allows for you to see all reports that have been run.

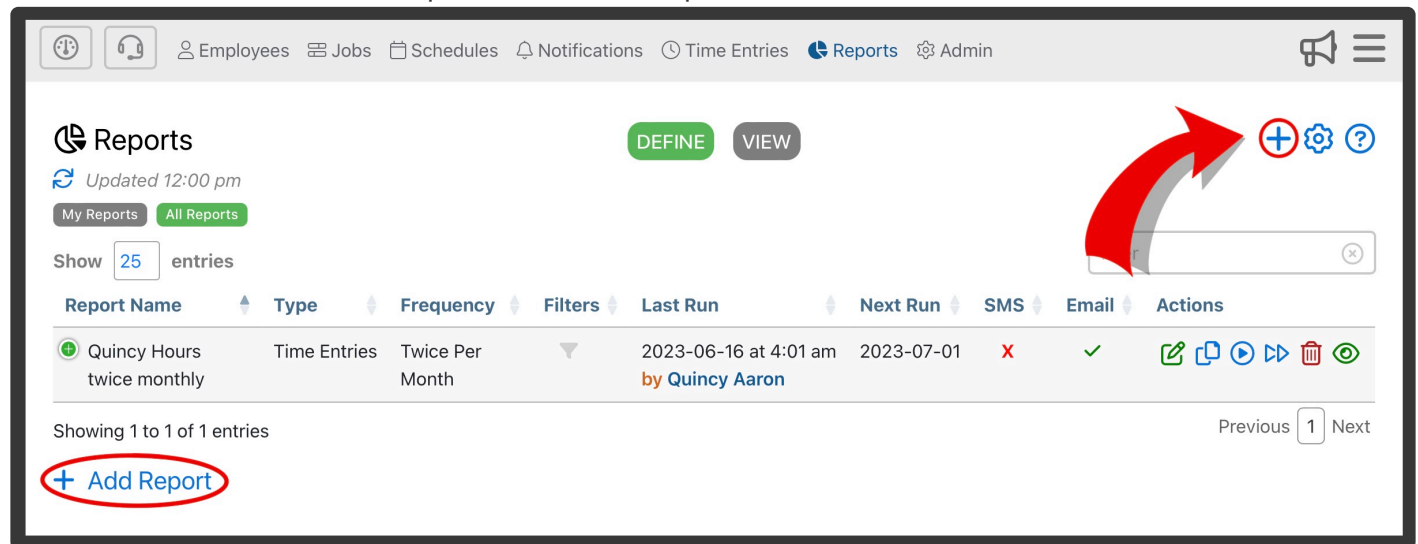
2. Here you can create a new report , adjust settings , and find additional information about the reports page .

3. Here you can edit reports , copy a pre existing reports , rerun the most recent report run, run a report in advance, delete reports , and view the most recent run of that report.

4. Here, you can add a new report. This has the same function as the blue plus sign  in the upper right corner.

3.8.1. Adding Reports

You can create a new report by either using the **+** icon in the upper right corner or use the **+ Add Report** in the lower left corner of the Reports section of the portal. .



This will bring you to the **Add Report** form where you can enter the Report Name, Report Type, Report Frequency (daily, weekly, bi-weekly, twice monthly, monthly, or custom)

Highlights of This Form

Report Name

Report names should specify the use for that report, such as location, what's being reported, and the reports frequency. For example, "Anderson Building Hours Weekly"

Report Type

Telephone Timesheets currently supports 30 different report types.

To learn more about each report type, go the the [Report Types](#) section of the manual

Frequency

Here, you can select how often this report will run; you can choose between daily, weekly, bi-weekly, twice per month, monthly, and custom.

Only when I click run

When selected, this report will only run when initiated by an admin. Even when a frequency is selected the report still must be manually ran.

Automatically

When selected, this report will run automatically following the frequency you have selected.



When a report is set to run automatically, you will need to set a time for the report to run and a timezone

Hours and minutes

When selected, time displayed in your report will display the hours and minutes. (ex. 4:30)

Decimal form

When selected, time displayed in your report will display hours and minutes in a decimal format. (ex. 4.5)

Report Owner (advanced options)

A report owner will have access to any report they are assigned to. A report owner must be a supervisor. You can select either an individual supervisor, or all supervisors by selecting “Any Supervisor”.

Share with Group (advanced options)

You can link supervisor groups to specific reports to allow access to members of this group to manage this report and view related records.

Share with Supervisor (advanced options)

You can link individual supervisors to specific reports to allow access to members of this group to manage this report and view related records.

Report Options

Here you can select additional information to add to a report.

- **Enable pagination**

When enabled, reports will print with only one employee section per page.

- **Include suspect time entries**

When enabled, time entries that may need manual adjustments will be displayed in the report. This would include any time entries that are very short in duration, very long in duration, or missing a check-out.

- **Include employee pay rate info**

When enabled, employees pay rate information will be displayed within the report. For more information on employee pay rates, go to the [Bill/Pay Rates Hierarchy](#) section of the manual.

- **Include vendor pay rate info**

When enabled, vendor pay rate information will be displayed within the report. For more information on vendor pay rates, go to the [Bill/Pay Rates Hierarchy](#) section of the manual.

- **Include client bill rate info**

When enabled, client bill rate information will be displayed within the report. For more information on

client bill rates, go to the [Bill/Pay Rates Hierarchy](#) section of the manual.

- **Include employee notes info**

When enabled, employee notes will be visible in the report anywhere that includes time entry details.

- **Include admin notes info**

When enabled, admin notes will be visible in the report anywhere that includes time entry details.

- **Send text when report runs**

When enabled, any linked phone numbers to a report will be sent a text message whenever the report is ran.

- **Send text when report runs**

When enabled, any linked emails to a report will be sent a email whenever the report is ran.

Filter Options

When applying filters to reports, only records matching those filters will be included in the report. For example, if you wish to run a report to view an individual employees time entries, you can apply a filter to only view time entries created by that employee. There is no need to select any filter options unless you wish to limit your reports to a subset of the available data.

- **Employee Supervisors**

When enabled, all records assigned to any linked employee supervisor will be available in this report

- **Job Site Supervisors**

When enabled, all records assigned to any linked job site supervisor will be available in this report

- **Employees**

When enabled, all records assigned to any linked employee will be available in this report. Optionally, you can link employee tags. This allows for you to select tags rather than specific employees. For more information of tags, go to the [Add Employee](#) section of the manual.

- **Jobs**

When enabled, all records assigned to any linked jobs will be available in this report. Optionally, you can link states where jobs are located. This allows for you to select jobs within a certain state rather than specific jobs.


- **Client**

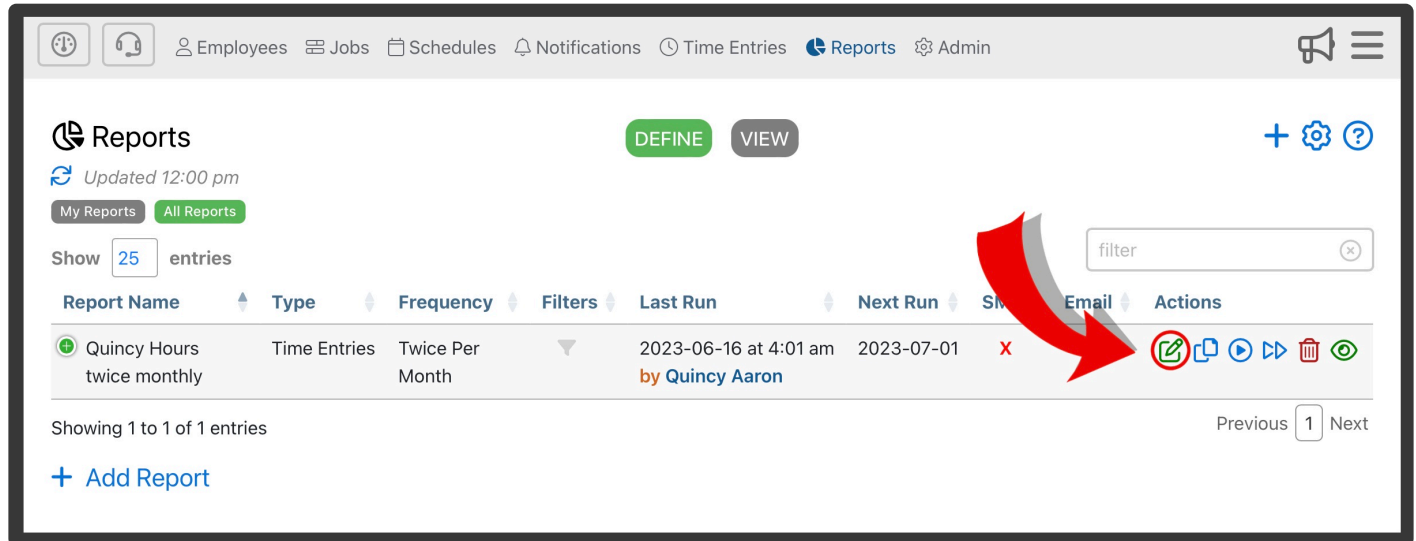
When enabled, all records assigned to any linked client will be available in this report.

- **Vendors**


When enabled, all records assigned to any linked vendor will be available in this report.

3.8.2. Editing Reports


You can edit a reports details by clicking on the green edit button  in the Actions column for that report. This will bring you to the **Edit Report** form. Here you can modify any report information. This will have the same fields as the Add Report form. Go to the [Adding Reports](#) section of the manual to learn more about the form.

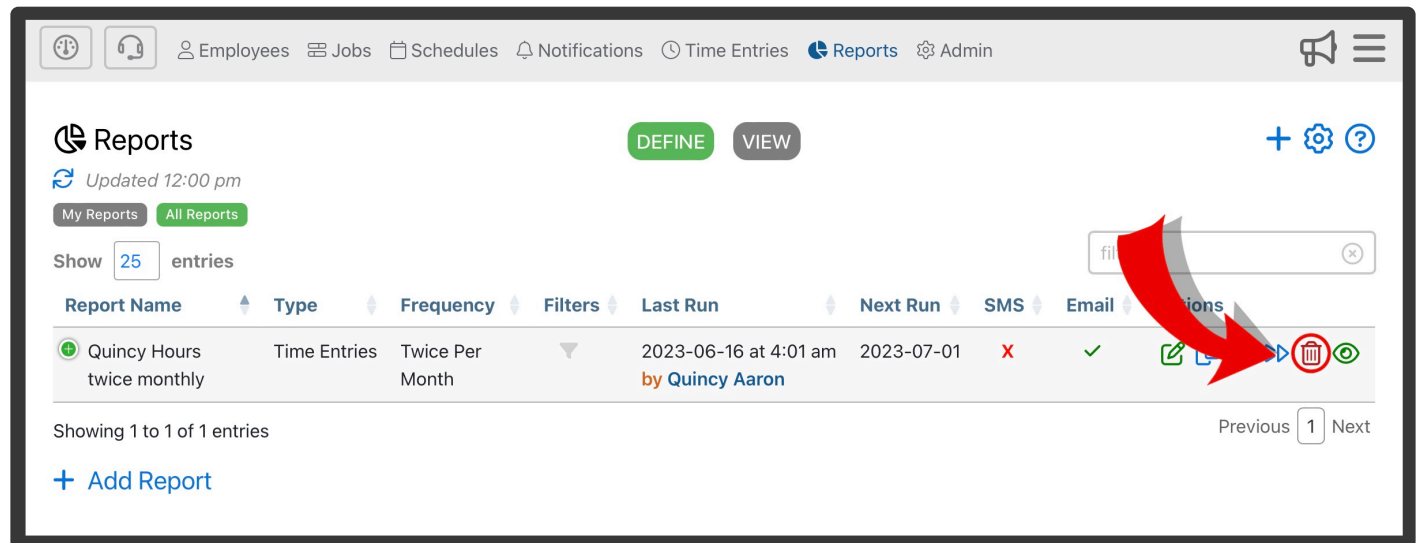


The screenshot displays the 'Reports' management interface. At the top, there are navigation tabs: Employees, Jobs, Schedules, Notifications, Time Entries, Reports (active), and Admin. Below the tabs, the 'Reports' section is titled, with 'Updated 12:00 pm' and buttons for 'My Reports' and 'All Reports'. A 'Show 25 entries' dropdown is present. The main table lists reports with columns: Report Name, Type, Frequency, Filters, Last Run, Next Run, Status, Email, and Actions. One report, 'Quincy Hours twice monthly', is listed with a status of 'X' and a last run date of '2023-06-16 at 4:01 am by Quincy Aaron'. A red arrow points to the green edit icon in the Actions column. At the bottom, there's a pagination control showing 'Showing 1 to 1 of 1 entries' and a '+ Add Report' button.





✿ If you do not see the green Edit button, it is because the screen is too small and you will need to expand that entry by first clicking on the green plus icon  immediately to the left of the entry.

3.8.3. Deleting Reports

To manually delete a report from the Define or View tab, click on the red Delete button  in the Action column.



The screenshot shows the 'Reports' section with the 'DEFINE' tab selected. A table lists reports, and a red arrow points to the delete icon in the 'Actions' column for the 'Quincy Hours' report.


Report Name	Type	Frequency	Filters	Last Run	Next Run	SMS	Email	Actions
Quincy Hours twice monthly	Time Entries	Twice Per Month		2023-06-16 at 4:01 am by Quincy Aaron	2023-07-01	X	✓	   




Deleting a report from the Define tab will not delete the report history. If you wish to delete the historical copies of a report, you must delete each past report individually in the View tab.


3.8.4. Running Reports

Reports that have a frequency of daily, weekly, bi-weekly, twice per month, or monthly, can be run automatically. These reports will run the day after the end date of the report. For daily reports, automatic run occurs the following day at 7:00AM Central Time (USA). For all other frequencies, automatic reports run at Noon Central Time, the day after the last day of the report period. For example, a weekly payroll report that covers the period from Monday through Sunday, will run each Monday at Noon Central Time.





For reports that are set to run manually, or to re-run a past report, you will have to click on the blue Run button  in the Action column of that Report.

To run current report period-to-date, click  in the action column of that report


 **Reports**
+ □ ?




 Updated 10:58 pm

Show entries
 Search:

Report Name	Type	Frequency	Last Run	Next Run	SMS	Email	Actions
Daily Digest	Emp. & Job Summary	Daily		2019-10-17	X	✓	   

Previous Next

 **Report History**
Search:

Report Name	Type	Start	End	Completed	Actions
Daily Digest	Emp. & Job Summary	2019-10-16	2019-10-16	2019-10-16 at 11:08 pm	  

3.8.5. Report Types

Telephone Timesheets currently provides 30 different report types. Each report type has a unique purpose and can be customized to your needs using filters. Telephone Timesheets support can create custom reports based on your business needs.



Contact support@telephonetimesheets.com if you need a specific type of report. We do not charge for custom report development.

Here are some of the most commonly used reports. Click on the report types below to view details.

1. [Suspect Time Entries](#) Entries}
2. [Employee Summary](#)
3. [Job Summary](#)
4. [Employee & Job Summary*](#)
5. [Payroll Report](#)
6. [Payroll Overtime](#)
7. [Payroll with US Holiday & Overtime Hours](#)
8. [QuickBooks Desktop Export](#)
9. [Time Entry Dump](#) Entry-dump}
10. [Missing Time Entries](#) Entries}
11. [New Employee Summary](#)

3.8.5.1. Suspect Time Entries

The Suspect Time Entries report type is meant to highlight only those time entries that are likely to need a closer look. Specifically, this report will show any time entries that are very short in duration, very long in duration, or missing a check-out. As a best practice, it is a good idea to take action on suspect time entries on a daily basis. It is much easier to fix any issues right away, when details are still fresh, than to let them build up and try to correct a large batch of time entries at one time. For this reason, we recommend that you create a recurring daily Suspect Time Entries report, and have it sent to each supervisor. However, these reports can be run over any custom date range, or according to a recurring frequency. The recurring frequency can be weekly, every two weeks, monthly, or twice per month (1st – 15th, and 16th – end of month).

These reports can also be filtered by supervisor. For details on report filter options, see the [Report Filters](#) section of the user manual.

3.8.5.2. Employee Summary

The Employee Summary report type is meant to show a summary of the hours worked by each employee. It also includes the detailed Time Entry list broken down by employee.

This report can be run over any custom date range, or according to a recurring frequency. The recurring frequency can be weekly, every two weeks, monthly, or twice per month (1st – 15th, and 16th – end of month).

This report can also be filtered by supervisor. For details on report filter options, see the [Report Filters](#) section of the user manual.

3.8.5.3. Job Summary

The Job Summary report type is meant to show a summary of the hours worked on each for each job. It also includes the detailed Time Entry list broken down by job.

This report can be run over any custom date range, or according to a recurring frequency. The recurring frequency can be weekly, every two weeks, monthly, or twice per month (1st – 15th, and 16th – end of month).

This report can also be filtered by supervisor. For details on report filter options, see the [Report Filters](#) section of the user manual.

3.8.5.4. Employee & Job Summary

The Employee & Job Summary report type is a combination of the data shown in the Employee Summary report plus the data shown in the Job Summary report. It also includes the detailed Time Entry list broken down by employee and by job.



Note By default, the Employee & Job Summary report is created for you, and runs daily. This report will arrive by email each day, and will show the hours worked by employee and by job. This report can be deleted or edited at any time.

This report can be run over any custom date range, or according to a recurring frequency. The recurring frequency can be weekly, every two weeks, monthly, or twice per month (1st – 15th, and 16th – end of month).

This report can also be filtered by supervisor. For details on report filter options, see the [Report Filters](#) section of the user manual.

3.8.5.5. Payroll Report

The Payroll Report is meant to tally employee hours over a given pay period, so that you can easily run payroll. It clearly shows the total hours worked by employee.

This report can be run over any custom date range, or according to a recurring frequency. The recurring frequency can be weekly, every two weeks, monthly, or twice per month (1st – 15th, and 16th – end of month).

This report can also be filtered by supervisor. For details on report filter options, see the [Report Filters](#) section of the user manual.

3.8.5.6. Payroll (Overtime)

The Payroll (Overtime) report type is meant to tally employee hours over a given pay period, so that you can easily run payroll. This report clearly shows the hours worked by employee, and includes a breakdown of hours worked by regular time, and overtime.

✿ Regular hours are any hours up to 40 in a 7-day week. Overtime hours are any hours over 40 in a 7-day week.

This report can be run over any custom date range, or according to a recurring frequency. The recurring frequency can be weekly, every two weeks, monthly, or twice per month (1st – 15th, and 16th – end of month).

This report can also be filtered by supervisor, employee, or job. For details on report filter options, see the [Report Filters](#) section of the user manual.

3.8.5.7. Payroll with US Holiday & Overtime Hours

The Payroll (US Holiday & OT) report type is meant to tally employee hours over a given pay period, so that you can easily run payroll. This report clearly shows the hours worked by employee, and includes a breakdown of hours worked by regular time, overtime, US holiday time, and overtime on US Holidays.

This report can be run over any custom date range, or according to a recurring frequency. The recurring frequency can be weekly, every two weeks, monthly, or twice per month (1st – 15th, and 16th – end of month).

This report can also be filtered by supervisor, employee, or job. For details on report filter options, see the [Report Filters](#) section of the user manual.

3.8.5.8. QuickBooks Desktop Export

The QuickBooks Desktop Export report is a special file that can be downloaded to your computer and then imported into QuickBooks Desktop software. Be sure to validate all of your Time Entries for accuracy before generating this export file. As a best practice, you should create a [Payroll Report](#) and validate all of the Time Entries for that pay period. Once all Time Entries are and correct you can then generate the QuickBooks Desktop Export report which can then be imported into QuickBooks Desktop as documented [here](#).

3.8.5.9. Time Entries Dump

This report is a raw data dump of all time entry data.

You may want to consider taking advantage of our [open API](#) to pull this data.

3.8.5.10. Missing Transactions

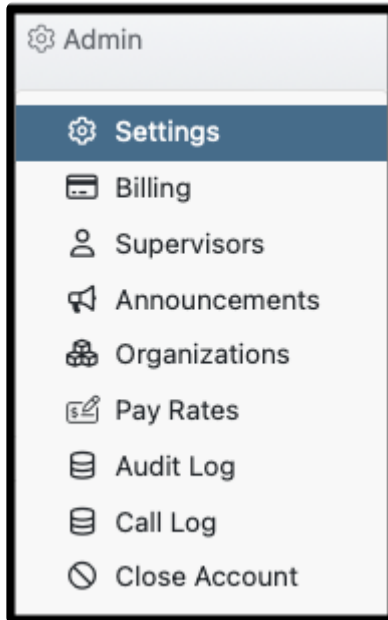
This report show all time entries with a clock in, but no clock out.

3.8.5.11. New Employee Summary

New Employee Summary reports only include employees whose first Time Entries took place during the period defined by the report.

3.9. Admin

The Admin menu presents a list of administrative functions. Click on the links below to learn more about each section.



[Settings](#)

[Billing](#)

[Supervisors](#)

[Announcements](#)

[Organizations](#)

[Pay Rates](#)

[Audit Log](#)

[Call Logs](#)

[Close Account](#)

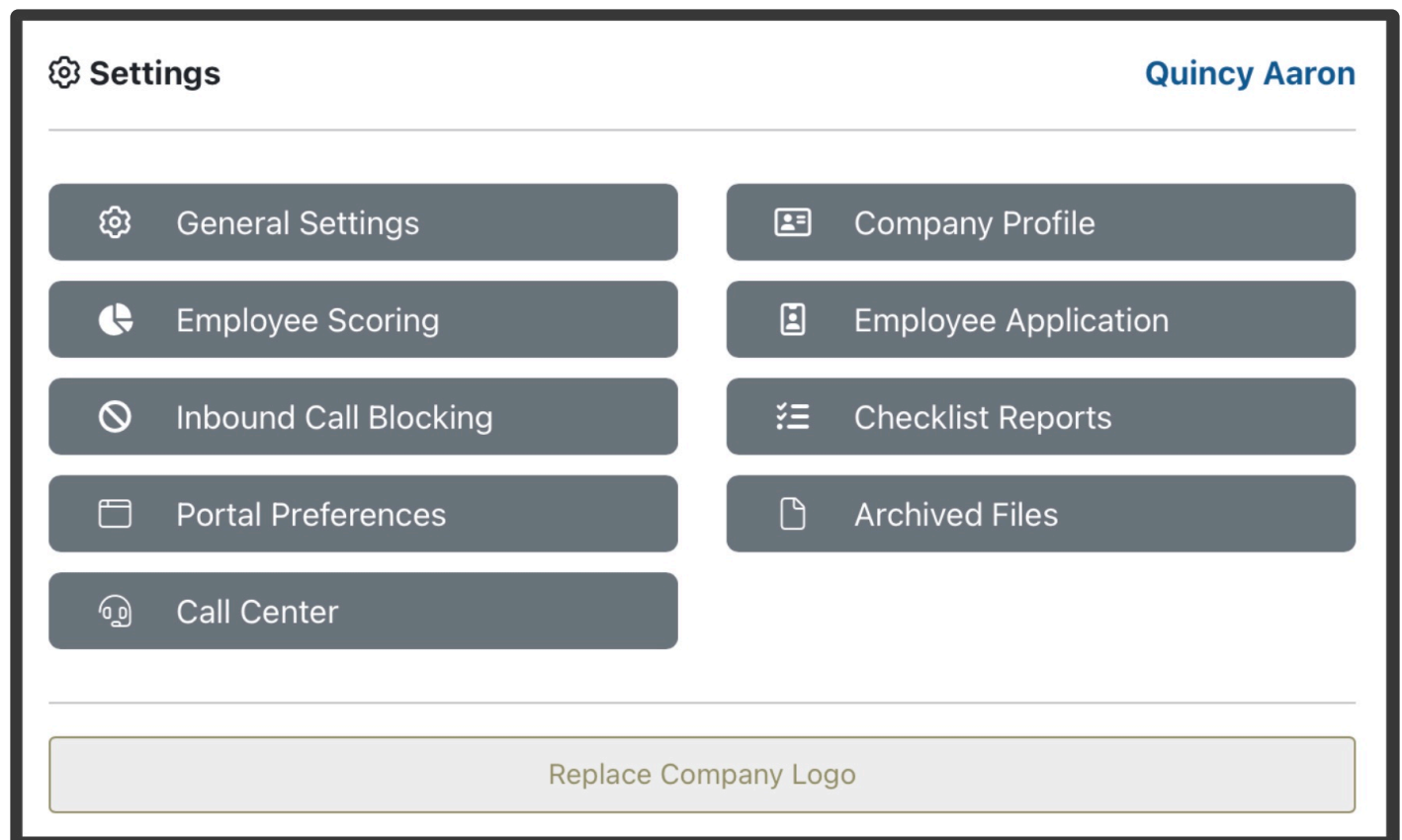


3.9.1. Settings


The Settings menu brings you to this screen where you will see 7 buttons that can be used to customize various settings. Each of these buttons covers different aspects of the system that can be customized.

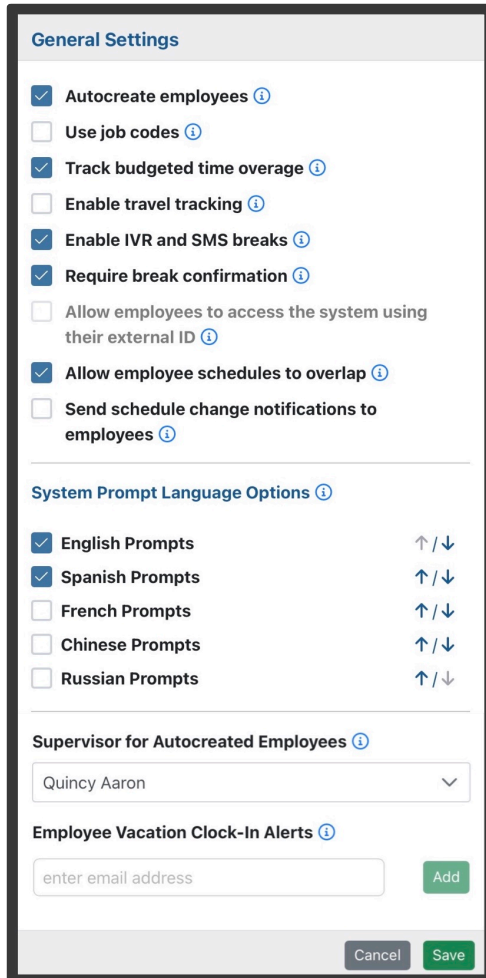
Click on one of the buttons to configure the following:

- [General Settings](#)
- [Company Profile](#)
- [Employee Scoring](#)
- [Employee Application](#)
- [Inbound Call Blocking](#)
- [Checklist Reports](#)
- [Portal Preferences](#)
- [Archived Files](#)
- [Call Center](#)




















3.9.1.1. General

General Settings can be used to customize the system according to your business needs. This includes things like whether to use job codes, which languages to use for employees, and whether to allow employees to self-enroll the first time they call in. There is a detailed explanation of each setting by clicking on the  icon.



The screenshot shows the 'General Settings' form. It is divided into several sections:

- General Settings:** A list of checkboxes with associated info icons.
 - ☒ Autocreate employees 
 - ☐ Use job codes 
 - ☒ Track budgeted time overage 
 - ☐ Enable travel tracking 
 - ☒ Enable IVR and SMS breaks 
 - ☒ Require break confirmation 
 - ☐ Allow employees to access the system using their external ID 
 - ☒ Allow employee schedules to overlap 
 - ☐ Send schedule change notifications to employees 
- System Prompt Language Options **: A list of language prompts with checkboxes and up/down arrows.
 - ☒ English Prompts 
 - ☒ Spanish Prompts 
 - ☐ French Prompts 
 - ☐ Chinese Prompts 
 - ☐ Russian Prompts 
- Supervisor for Autocreated Employees **: A dropdown menu showing 'Quincy Aaron'.
- Employee Vacation Clock-In Alerts **: A text input field with the placeholder 'enter email address' and an 'Add' button.

At the bottom of the form are 'Cancel' and 'Save' buttons.

Highlights of This Form

Autocreate employees

When enabled, new employees will be able to self enroll when calling in for the first time

Use job codes

When enabled, you can create codes for employees used for clocking in/out. If in use, the system will prompt your employees to enter this code when clocking in/out.

Track budgeted time overage

When enabled, Telephone Timesheets tracks the hours worked vs the hours budgeted for a job using Time Budgets. When utilizing the Time Budget, you are able to set an amount of time (e.g. 5 hours) to a job, and

report on overages if they occur.



In order to utilize this feature, you must first set a Time Budget in the Add/Edit Job form. For more information on Time Budgets, go to the [Using Time Budgets](#) section of the manual.

Enable travel tracking

When enabled, Telephone Timesheets will track employee travel using the employee web app. Travel entries will be logged in the time entries section.

Enable IVR and SMS breaks

When enabled, employees will be able to start and end breaks via call or text.



To learn more about how breaks can be initiated via call or text, go to the [Enable Breaks By Calls & Texts](#) section of the manual.

Require break confirmation

When enabled, employees will be asked to confirm that they were given the opportunity to take all allowed breaks for their shift.



For more information of breaks and possible violations, go to the [Break Violations Reporting](#) section of the manual

Allow employees to access the system using their External ID

This option is only available if all employees have an External ID set. It allows them to use either their External ID or their phone number when accessing the system by phone.

Allow employee schedules to overlap

When enabled, it's allowed to create employee schedules which overlap existing schedules.

Send schedule change notifications to employees

When enabled, employees will be notified with updated schedule information when their schedule changes.

System Prompt Language Options

Here, you can select the languages that your employees speak. When employees clock in/out over the phone, they will hear all languages that you have selected. You can adjust the order of which the languages are presented over the phone. For example, if you have English and Spanish selected, you can choose which language plays first over the phone.

Supervisor for Autocreated Employees

Here, you can select a supervisor that is automatically assigned to all autocreated employees.

Employee Vacation Clock-In Alerts

An optional list of email addresses which will be notified if an employee attempts to clock-in while on vacation. An employee is considered to be on vacation if they have been scheduled in the Time Off tab in the Schedules section of the Admin Portal.



3.9.1.2. Company Profile

The **Company Profile** settings can be used to enter information about your company like company name, address, and timezone.

Company Profile

Company Name

Street Address

Address Line 2

City

State/Region

Zip/Postcode

Default Timezone ⓘ

Default Supervisor Phone # ⓘ

✓

Default Supervisor Email ⓘ

Cancel

Save



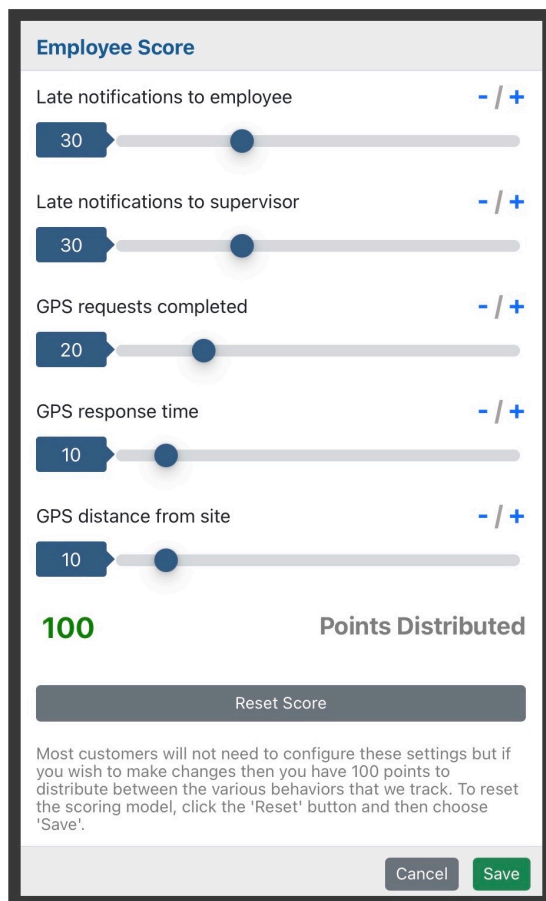
3.9.1.3. Employee Scoring

The employee score is meant to be a simple way to draw attention to employees who have consistent good behavior, as well as those who have consistently bad behavior. Scores are updated daily based on the employee's behavior over the last 30 days.

The following employee behaviors are scored:

- The number of times the system had to call the employee for being late
- The number of times the system had to notify the supervisor that the employee was late
- The number of times the employee failed to share GPS
- The number of times the employee waited too long to share GPS
- The number of times the employee shared GPS but was too far away from the job site

These individual behaviors can be prioritized to meet your specific requirements.



The image shows a mobile application interface for configuring employee scores. It features five sliders for different behaviors, each with a current value and a range from 0 to 100. The total points distributed is shown as 100. A 'Reset Score' button is present, along with a 'Cancel' and 'Save' button at the bottom. A note explains that most customers do not need to configure these settings, but if they do, they have 100 points to distribute.

Behavior	Current Value	Range
Late notifications to employee	30	0 - 100
Late notifications to supervisor	30	0 - 100
GPS requests completed	20	0 - 100
GPS response time	10	0 - 100
GPS distance from site	10	0 - 100

100 Points Distributed

Reset Score

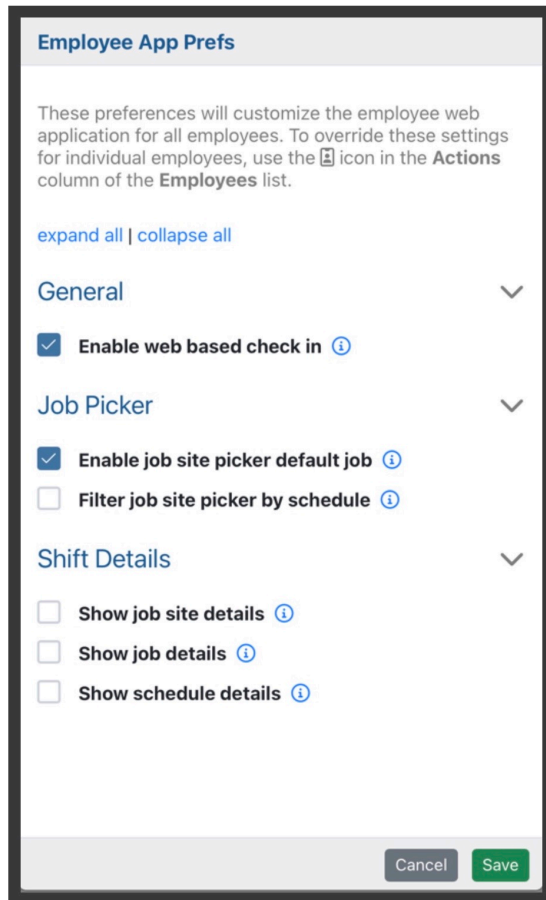
Most customers will not need to configure these settings but if you wish to make changes then you have 100 points to distribute between the various behaviors that we track. To reset the scoring model, click the 'Reset' button and then choose 'Save'.

Cancel Save




3.9.1.4. Employee Application

Employee application settings can be used to customize the behavior of the employee web app.





The screenshot shows a mobile application settings screen titled "Employee App Prefs". At the top, there is a grey header bar with the title. Below the header, a paragraph explains that these preferences customize the employee web application for all employees and that individual overrides can be done via an icon in the Actions column of the Employees list. Below this is a link "expand all | collapse all". The settings are organized into three expandable sections: "General", "Job Picker", and "Shift Details". The "General" section has a checked checkbox for "Enable web based check in". The "Job Picker" section has a checked checkbox for "Enable job site picker default job" and an unchecked checkbox for "Filter job site picker by schedule". The "Shift Details" section has three unchecked checkboxes: "Show job site details", "Show job details", and "Show schedule details". At the bottom of the form are "Cancel" and "Save" buttons.


Employee App Prefs


These preferences will customize the employee web application for all employees. To override these settings for individual employees, use the  icon in the **Actions** column of the **Employees** list.


[expand all](#) | [collapse all](#)


General 


☒ **Enable web based check in** 


Job Picker 


☒ **Enable job site picker default job** 

☐ **Filter job site picker by schedule** 

Shift Details 

☐ **Show job site details** 

☐ **Show job details** 

☐ **Show schedule details** 

[Cancel](#) [Save](#)

Highlights of This Form

Enable web based check in

When enabled, employees will be allowed to clock in using the mobile web app. When disabled, employees will only be able to clock in via phone call

Enable job site picker default job

When enabled, employees will have the option to clock in to the default job when using the job site picker in the employee web app.

Filter job site picker by schedule

When enabled, jobs will be filter in the job site picker to display only scheduled jobs in the employee web portal. This way employees can't clock in to unscheduled jobs.

Show job site details

When enabled, job site details will be visible to employees on the clock in screen and schedule view in the employee web portal.

Show job details

When enabled, job details will be visible to employees on the clock in screen and schedule view in the employee web portal.

Show schedule details

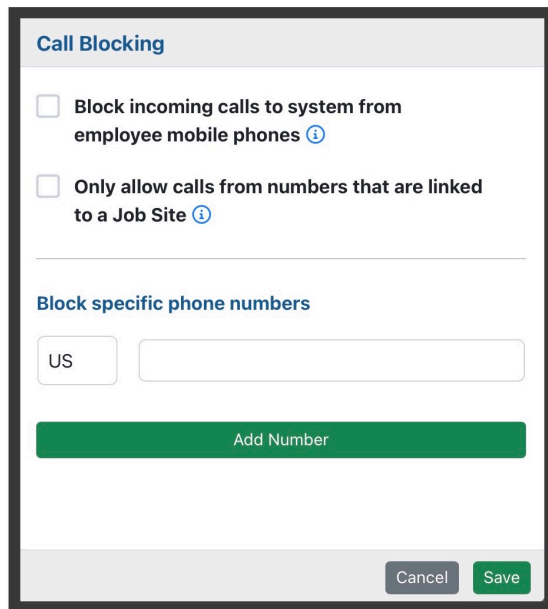
When enabled schedule details will be visible to employees on the clock in screen and schedule view in the employee web portal.



3.9.1.5. Inbound Call Blocking

There are 3 options for blocking inbound calls:

1. Block inbound calls from employee mobile numbers. If we see an incoming call from an employee's mobile phone, we will answer with *"Calls from mobile devices are not allowed for this job, please call from a land line at the job site"* and then the call will be disconnected.
2. Block inbound calls from any number that is not explicitly linked to a job. If we see an incoming call from numbers that are not linked to a job, we will answer with *"You are calling from an unauthorized number, please call from an authorized job site number"* and then the call will be disconnected.
3. Block inbound calls from specific phone numbers. If a number is blocked in this way, the system will ignore the call entirely. No message will be played. The call will just disconnect immediately.



Call Blocking

☐ Block incoming calls to system from employee mobile phones ⓘ

☐ Only allow calls from numbers that are linked to a Job Site ⓘ

Block specific phone numbers

US

Add Number

Cancel Save



3.9.1.6. Checklist Reports

Checklist report are a special kind of report for the employee to fill out at the end of their shift. This “in-shift” report can be used to keep track of the performance of your employees.

These reports are unique, because they can be customized according to your business needs.

A checklist consist of a set of list items that you can customize. You can also target each list to specific employees and/or jobs.

The screenshot shows the 'New Checklist' form with the following sections:

- Enable Checklist:** A toggle switch is turned on.
- Type:** A dropdown menu is set to 'Shift Checklist'.
- Title:** A text input field with a '(required)' label.
- Instructions:** A text area for providing instructions.
- Remove Item:** A button to remove items from the list.
- Enter item to add:** A text input field with an 'Add' button.
- Checklist Targets:**
 - Targeted Employees:** A dropdown menu set to 'All Employees'.
 - Targeted Jobs:** A dropdown menu set to 'All Jobs'.
- Checklist Options:**
 - Require Checklist:** A checkbox that is currently unchecked.

At the bottom of the form are 'Cancel' and 'Save' buttons.

Highlights of This Form:

Checklist is Enabled/Disabled

This function makes the Checklist either active or inactive. Marking a Checklist as disabled makes it so employees can no longer fill out the checklist report.

Title

Here, the title of the checklist is created. The title appears in the employee web application and some reports to identify this checklist.

Instructions

Instructions appear in the employee web portal and some reports. Length should be kept to a few sentences.

Creating the Checklist

The checklist you create must consist of yes and no questions. For each item in the checklist, the employee will have the option to say yes ☒, no ☐, or not applicable for each item in the checklist.

Targeted Employees

Here, you can link 1 or more employees to a checklist report. This makes it so no matter what job the employee is doing, they are able to fill out this checklist

Targeted Job

Here, you can link 1 or more jobs to a checklist report. This makes it so that any employee doing that specific job can fill out this checklist.




When you configure target information, this checklist will be available to those who satisfy the target requirements. If no targets are specified, this checklist will be made available to every employee at any job.

Require Checklist

When enabled, this checklist will be required before checkout. If the checklist report isn't required, when an employee is to complete the checklist report they will need to navigate to Menu—> Reports—> Start new report.

Once a checklist has been created, it will be accessible from the employee web portal Reports menu.

**TELEPHONE
TIMESHEETS**

Select a report from the list below.
Please wait until you are ready to submit
your report before attaching photos.

Shift Report - attach notes to this shift for
your supervisor or provide a beginning or
end of shift summary.

Incident Report - collect information from
parties involved in an incident and document
conditions related to the incident.

Vehicle Inspection Report - report the
mileage and condition of your vehicle.

Checklist Report - fill out a shift checklist


cancel

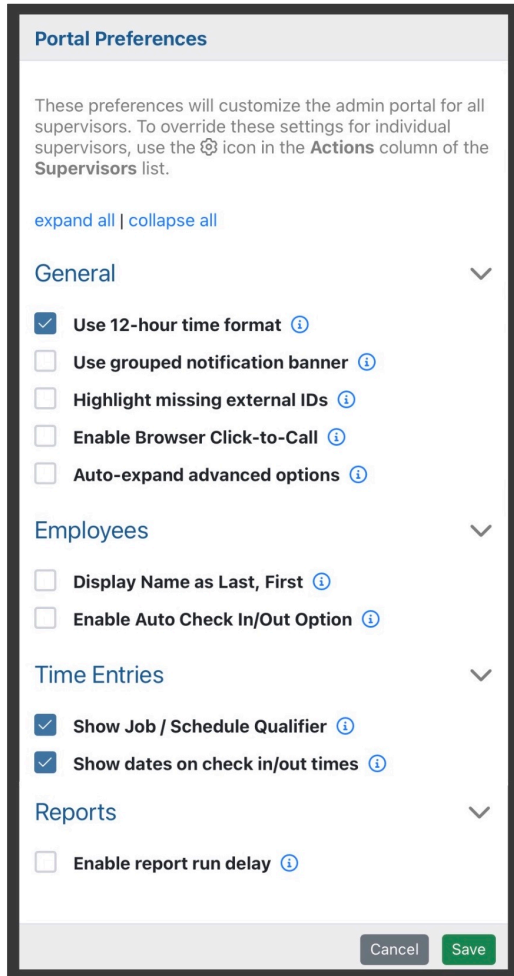



If more than one checklist report is targeting the same employee/job, each list will be combined into a single list that the employee will see when they fill out a Checklist Report.



3.9.1.7. Portal Preferences

You are able to customize the Admin Portal using the portal preferences settings. Any changes you make to the Admin Portal will be visible to all supervisors. To disable this feature for individual supervisors, go to the  icon in the Actions column of the Supervisors list.



The screenshot shows the 'Portal Preferences' form. At the top, it states: 'These preferences will customize the admin portal for all supervisors. To override these settings for individual supervisors, use the  icon in the **Actions** column of the **Supervisors** list.' Below this are links for 'expand all' and 'collapse all'. The form is organized into sections: 'General' (with options for 12-hour time format, grouped notification banner, missing external IDs, browser click-to-call, and auto-expand advanced options), 'Employees' (with options for display name and auto check in/out), 'Time Entries' (with options for job/schedule qualifier and dates on check in/out times), and 'Reports' (with an option for report run delay). Each section has a dropdown arrow. At the bottom are 'Cancel' and 'Save' buttons.

Highlights of This Form

Use 12-hour time format

When enabled, the system will format times for a 12 hour clock. If this option isn't selected times will be shown in 24 hour format.

Use grouped notification banner

When enabled, all your Telephone Timesheets notifications will be displayed on a single banner rather than displayed individuals on their own notification banners.

Highlight missing external IDs

When enabled, records that do not have external record IDs assigned will be flagged with a note indicate the ID is missing.

Enable Browser Click-to-Call

When enabled, you are able to call through your web browser when using click-to-call. Normally, Telephone Timesheets click-to-call system will then place two calls. One to the person you are calling, and the other to your mobile phone or desk phone. Then, we will bridge these two calls together. By enabling browser click-to-call, instead of placing a call to your mobile/desk phone, you will be able to call directly from the device initiating the click-to-call. This means you could call via your computer or any other device.

Auto-expand advanced options

When enabled, the Advanced Options section of various forms will be expanded automatically.

Display Name as Last, First

When enabled, the employee display name will be automatically formatted to use Last, First when editing their name.

Enable Auto Check In/Out Option

When enabled, an option will be exposed in the Add/Edit Employee form to enabling automatic check in/out for employees. This means that your employee will never need to clock in or out. This feature is disabled by default.

Show Job / Schedule Qualifier

When enabled, jobs in the Time Entries page will be labeled as scheduled, unscheduled, or no show.

Show dates on check in/out times

When enabled, the month and day (mm/dd) will be shown next to the check in and out times of the Actual Shift column in the Time Entries table.

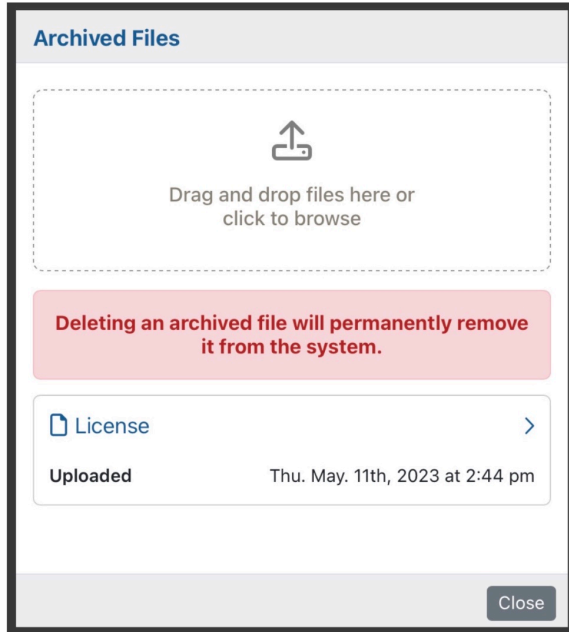
Enable report run delay

When enabled, the Add/Edit Report form has a field to specifying a report run delay. A report delay provides a window of time for data verification before reports are run. This way you can ensure the reports you run are accurate.



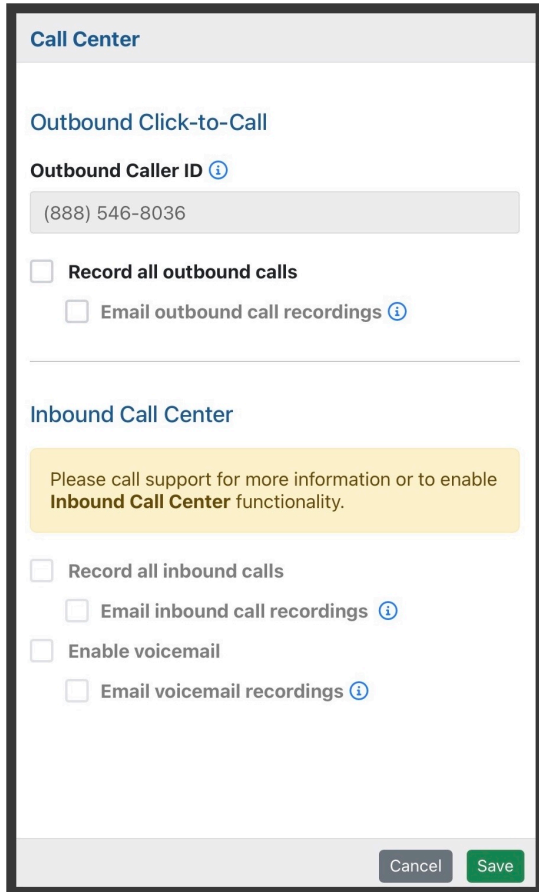
3.9.1.8. Archived Files

Archived Files is where you can find all your previously deleted files. Any file you chose to delete will be stored here. You are able to delete archived files. Deleting an archived file will permanently remove it from the system.



3.9.1.9. Call Center

The Call Center allows you to route all outbound “operations center” calls through Telephone Timesheets. When this feature is enabled, you will be able to allow your field supervisors, back office admins, and operations/dispatch teams to use Telephone Timesheets for all outbound calls.




The screenshot shows a web interface for configuring the Call Center. It has a title bar 'Call Center' and two main sections: 'Outbound Click-to-Call' and 'Inbound Call Center'. Under 'Outbound Click-to-Call', there is a field for 'Outbound Caller ID' with the value '(888) 546-8036'. Below this are two checkboxes: 'Record all outbound calls' and 'Email outbound call recordings', both of which are currently unchecked. The 'Inbound Call Center' section contains a yellow warning box stating 'Please call support for more information or to enable Inbound Call Center functionality.' Below the warning box are four checkboxes: 'Record all inbound calls', 'Email inbound call recordings', 'Enable voicemail', and 'Email voicemail recordings', all of which are unchecked. At the bottom right of the form are 'Cancel' and 'Save' buttons.

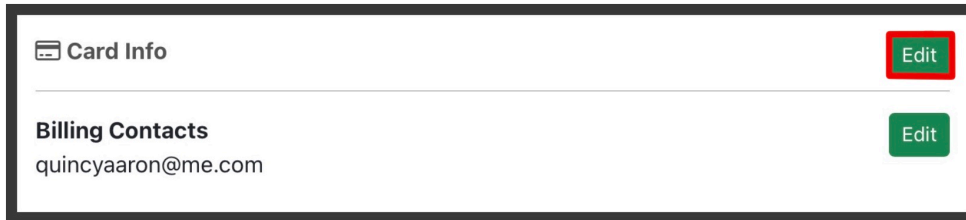
Here, you have the option to record all outbound calls and email those recordings to your chosen email address.


Optionally, this same feature can be used for inbound calls. Utilizing the call center for inbound calls is disabled. Contact support@telephonetimesheets to enable this feature. Here, you can record and email the inbound call, as well as any voicemails.





3.9.2. Billing

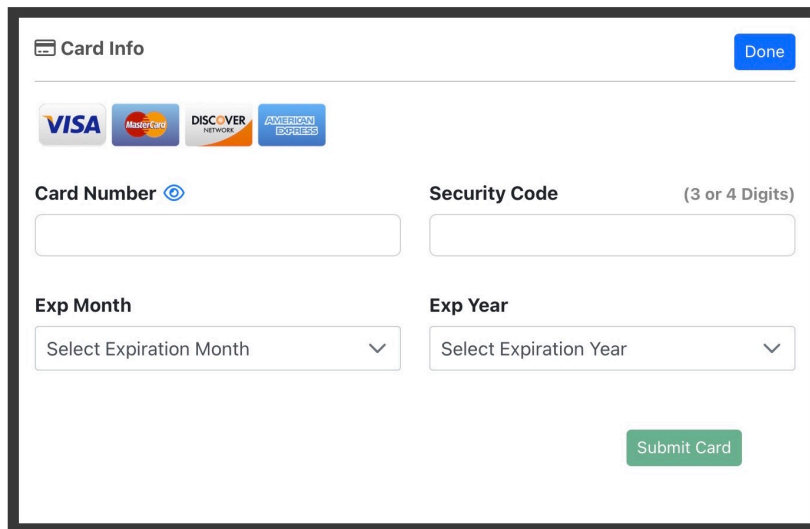
Click the green Edit button  to enter or delete your credit card information.








Card Info 


Billing Contacts
quincyaaron@me.com 

This clicking on the green Edit button  will open up a form where you can enter or delete your credit card information.




Card Info 

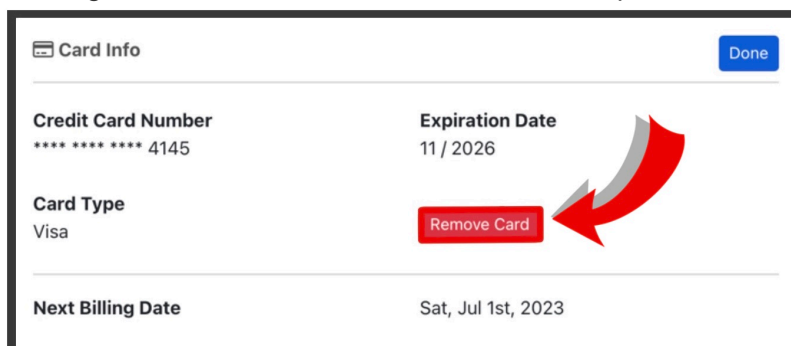
   


Card Number  **Security Code** (3 or 4 Digits)

Exp Month **Exp Year**

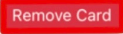



We don't allow editing of credit card information once it is entered into Telephone Timesheets. This is because we do not store the information. If you need to edit or update a card, you must first delete the existing card, then create a new card with the updated card information.




Card Info 

Credit Card Number
**** * 4145 **Expiration Date**
11 / 2026

Card Type
Visa  

Next Billing Date
Sat, Jul 1st, 2023

 **Note:** Telephone Timesheets does not store your credit card information. We allow you to input credit card information for a secure, one-time transmission to PayPal. PayPal processes all of our subscription billing, and PayPal is the only holder of your credit card information.

During the free trial, you will have full access to the system for as many users as you would like. You can enter your credit card information at any time during the 30-day free trial, but you will NOT be billed for the 30-day free trial. To continue beyond the 30-day free trial, you must submit your credit card information using the form provided.

We will send you a few reminder emails during the free trial period, but we will not contact you again after the trial period. We don't pester people who took the time to try the system and we remove all of your data automatically. We will never share your contact information with anyone.

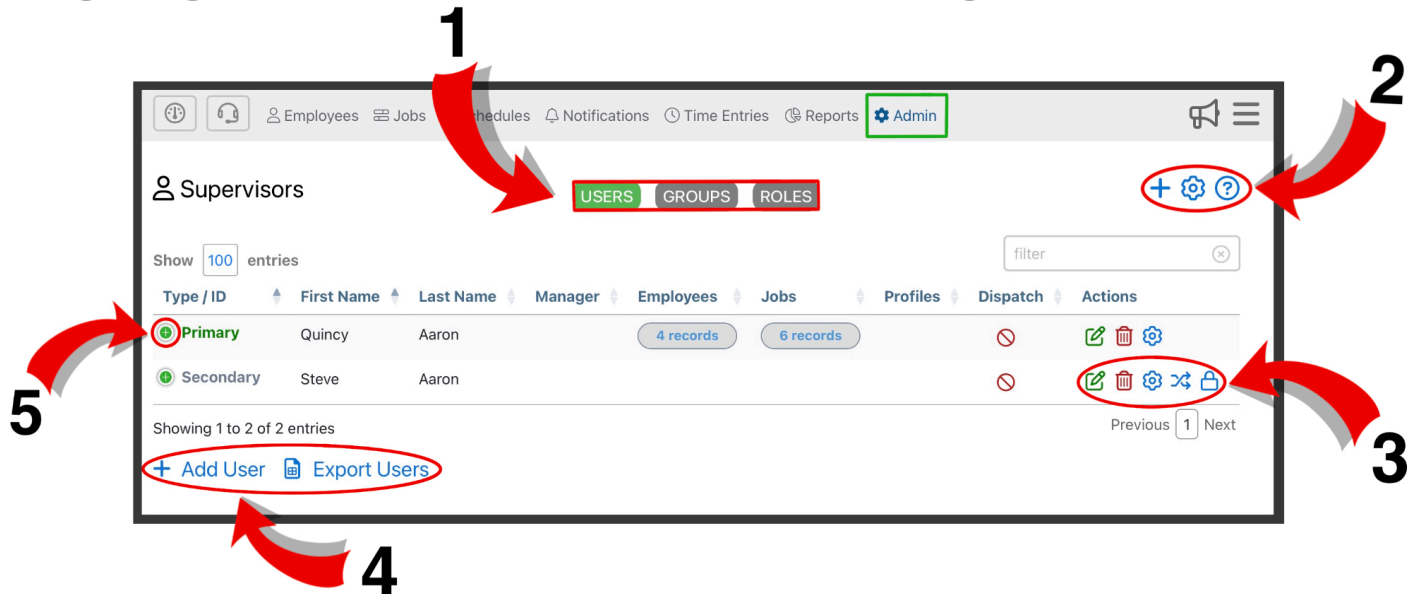
Billing occurs at the end of your second month. For example, if you sign up on August 4th, your free trial will expire on September 4th. We always bill at the end of a billing cycle so we can tally up how many active users you had. So, your first monthly billing would occur on October 4th. A full 60 days after your initial sign-up.

3.9.3. Supervisors




The primary supervisor (the person who created the Telephone Timesheets account) can create additional secondary supervisors.






When secondary supervisors are created, they are by default allowed full access to the administrative portal with one exception; only the primary supervisor can create secondary supervisors. Secondary supervisors can be restricted through permissions.



Highlights of The Supervisors Page




1. Supervisors are organized into 3 different categories; Users, Groups, Roles. You can filter supervisors using these 3 tabs.

2. Here you can add a supervisor , adjust settings , and find additional information about the supervisors page .

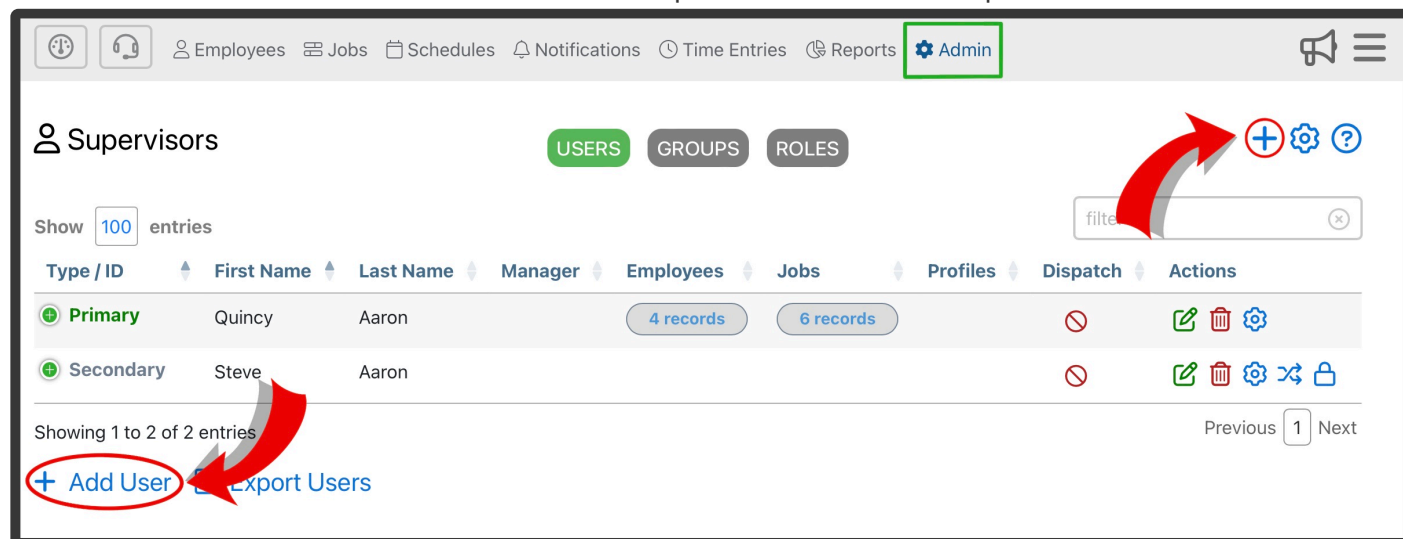
3. Here you can edit , supervisors, delete , supervisors, change an individual supervisors Admin Portal preferences , transfer ownership of employee and job site records , and supervisor permissions .

4. Here, you can add a new supervisor. This has the same function as the blue plus sign  in the upper right corner. You can also download supervisor records by clicking  **Export Users**

5. Here you can expand a supervisors information by clicking the  icon.

3.9.3.1. Adding A Supervisor

You can create a new supervisor by either using the **+** icon in the upper right corner or use the **Export Users** in the lower left corner of the Supervisors section of the portal.



This will bring you to the **Add User** form where you can enter the Supervisor Name, Mobile Number, Supervisor Type, and other details for the new supervisor.

Highlights of This Form:

First Name

First name of the employee. It is OK to have more than one employee with the same first name.

Last Name

Last name of the employee. It is OK to have more than one employee with the same last name.

Display Name

When entering your employee's first and last name, their display name will auto-fill. However, you can enter a custom display name in this field. This is especially useful if you have 2 employees with the same first and last name. For example, if you have two employees named James Smith, but one of them goes by Jim and the other goes by Jimmy, you could customize their display names to be Jim Smith and Jimmy Smith.

Mobile Number

This is where you add a supervisors mobile phone number. Please carefully check the mobile number you enter. That number will receive a text message with a link to the admin portal. It will also contain their temporary password.



Optionally, you can use an External ID for verification. This doesn't replace the supervisors

mobile phone number, rather, it allows them to log in using either their External ID or their Mobile Number.

Email Address

This is where you can add a supervisors email. This is optional.

Supervisor Type

By selecting a supervisor type, you are determining what that supervisor is able to do within the Admin Portal. This is how you can limit a supervisors access to certain aspects of the system.

A primary supervisor is not restricted.

A secondary supervisor can have access permissions configured.

A manager is a secondary supervisor who can manage other supervisors.

Please contact support for assistance if you need to help managing access for your supervisors.



You can also choose to restrict a supervisor to a read-only role, or a non-admin role by using the select role pull-down menu. Non-admin supervisors are not allowed access to the portal, but can be assigned to records for the purposes of reporting.

Supervisor Role (required)

Select a role

- Select a role
- Managing Supervisor
- Secondary Supervisor
- Non-Admin Supervisor
- Read Only Supervisor

You can also add supervisors to a group. Select the group tab at the top of the Supervisors page.

🔍 📄 🧑 Employees 📅 Jobs 📅 Schedules 🔔 Notifications ⌚ Time Entries 📊 Reports 🔌 Integrations ⚙️ Admin 🔔 ☰

🧑 Supervisors - Groups

USERS GROUPS

+ ⚙️ ?

filter

From there, click on the **+** icon in the upper right corner of the portal. This will bring up the supervisor group edit form as show here.

New Group

Name (required)

Linked Supervisors

Select Supervisors

External ID

Details

Cancel Save

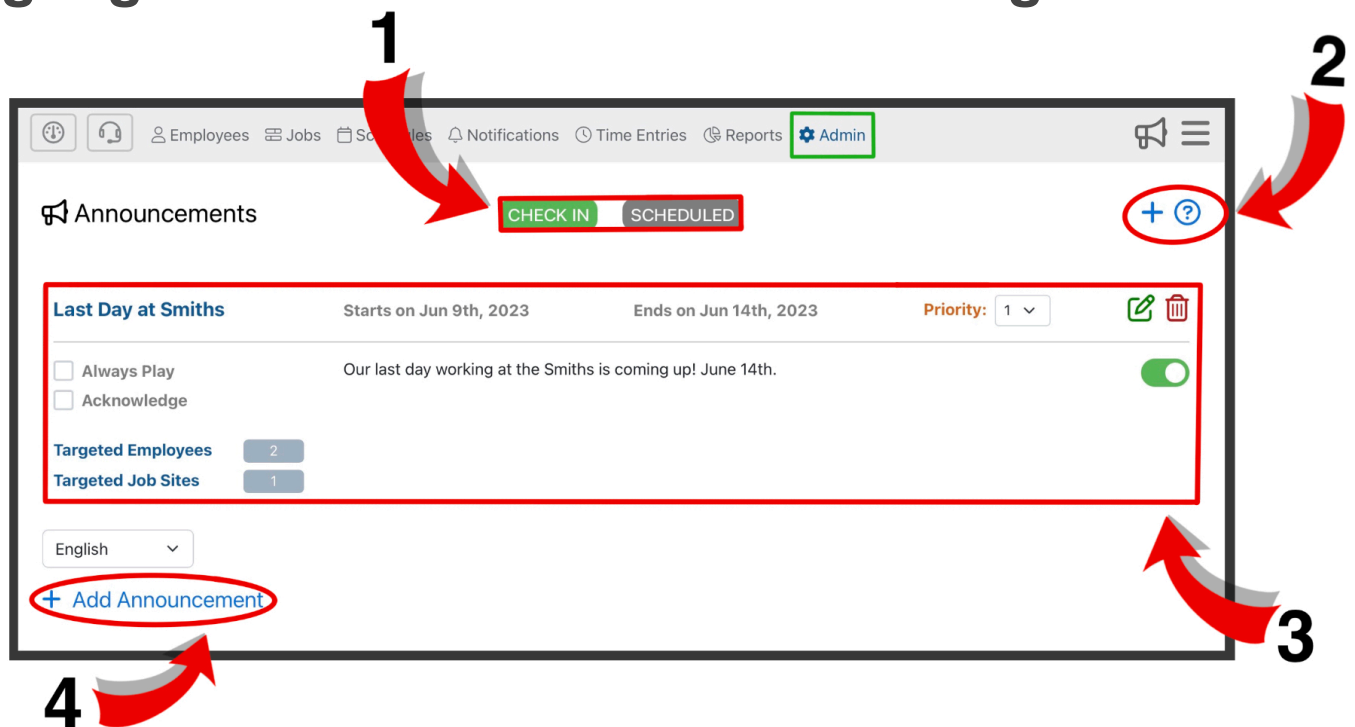
3.9.4. Announcements

There are two types of announcements:

1. Check In Announcements: These messages play when an employee calls to clock in. They are also displayed for employees who clock in using the employee web portal.
2. Scheduled announcements: These messages are delivered to your employees via text and can be scheduled for a particular time, or they can be delivered immediately for urgent messages/alerts.

* In either case, announcements will be automatically translated to the employee's selected language. To learn how to modify an employees selected language, go to the [Adding Employees](#) section of the manual.


Highlights of The Announcements Page



1. Announcements are organized into 2 different categories; Check In and Scheduled. You can filter announcements using these tabs.

2. Here you can add an employee **+**, and find additional information about the announcements page **?**.

3. Here you can edit  announcements, delete  announcements, and change announcements to active or inactive .

4. Here, you can add a new employee. This has the same function as the blue plus sign  in the upper right corner.

3.9.4.1. Adding Announcements

You can create a new announcement by either using the **+** icon in the upper right corner or use the **+ Add Announcement** in the lower left corner of the Announcements section of the portal. You can also create an announcement from anywhere in the Admin Portal using the announcement icon in the upper right corner.

This will bring you to the **Add Announcement** form where you can enter the Announcement Name, Start/End Date, Custom Message, and other details.

Highlights of This Form:

Check In Announcement

Name

Here, you can enter the name of the announcement. This will Not be displayed to the employee.

Start/End Date

Here, you can select the start and end date of your announcement. This will determine how long the announcement will be visible for.

Message

Any message you create will be heard over the phone or seen in the employee web portal during check in.

Target Employees

Here, you can link an employee to an announcement. You can select individual employees or multiple employees to receive the announcement.

Target Job Site

Here, you can link a job to an announcement. You can select individual jobs or multiple jobs to receive the announcement.

Announcement Options

There are 2 announcement options:

- Always Play: When enabled, this announcement will repeat each time an employee clocks in.
- Require Acknowledgement: When enabled, this announcement will require the employee to acknowledge they have heard the message.



When neither option is selected, the announcement will play once for each employee.

Files (advanced options)

Here, you can attach files to an announcement. Any files that you attach to an announcement will be displayed in the announcement when employees clock in via employees web portal.

Scheduled Announcement

Actions

There are 2 types of scheduled announcement options:

- Custom Message: This announcement type allows you to send a custom message to your employees
- Send Employee Schedule: This announcement type will send your targeted employees a link to their schedule via the employee web portal

Send Immediately

When enabled, this announcement will be immediately sent when saved or updated

Save As Template

When enabled, this announcement will be saved as a template which can be sent, rescheduled, or modified for later use.

Target Employees

Here, you can link an employee to an announcement. You can select individual employees or multiple employees to receive the announcement.

Target Job Site


Here, you can link a job to an announcement. You can select individual jobs or multiple jobs to receive the announcement.

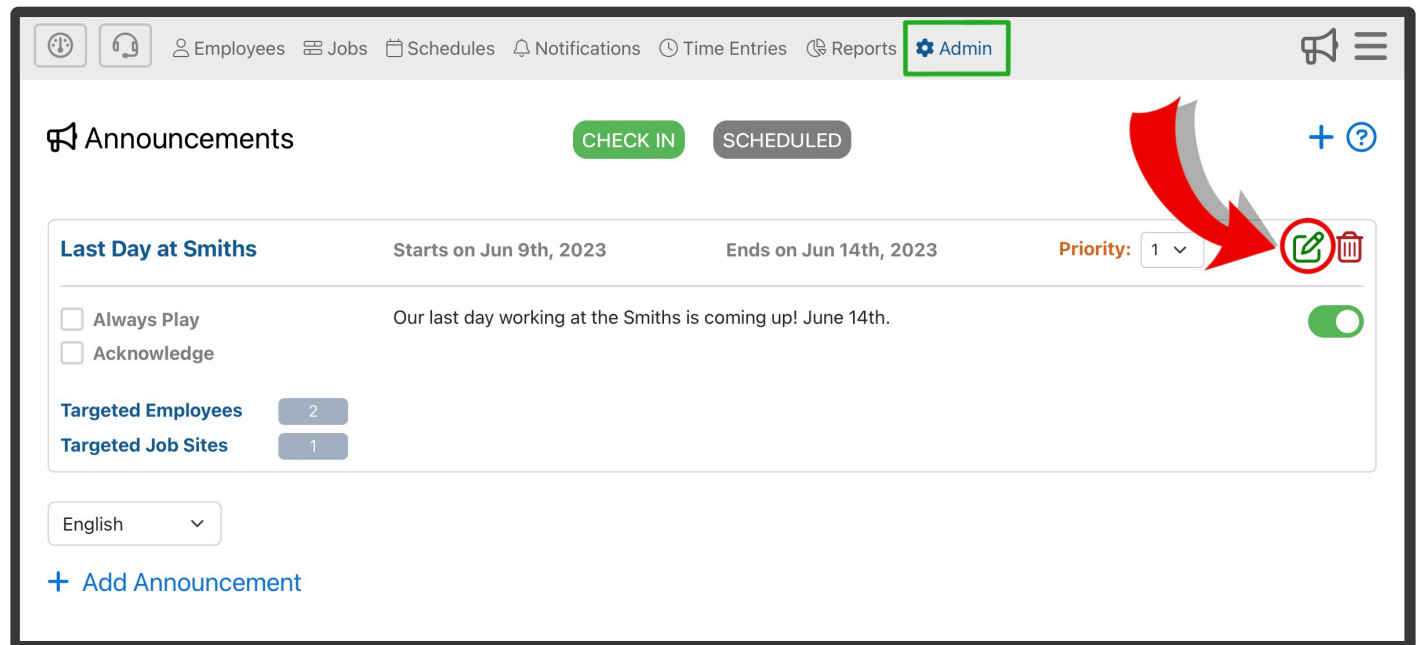
Files (advanced options)





Here, you can attach files to an announcement. Any files that you attach to an announcement will be


displayed in the announcement when employees clock in via employees web portal.



3.9.4.2. Editing Announcements


You can edit an announcement by clicking on the green edit button . This will bring you to the **Edit Announcement** form. Here you can modify an announcements details. This will have the same fields as the Add Announcement form. Go to the [Adding Announcements](#) section of the manual to learn more about the form.




  [Employees](#) [Jobs](#) [Schedules](#) [Notifications](#) [Time Entries](#) [Reports](#) [Admin](#)  

 Announcements CHECK IN SCHEDULED + ?

Last Day at Smiths Starts on Jun 9th, 2023 Ends on Jun 14th, 2023 Priority: 1  

☐ Always Play ☐ Acknowledged Our last day working at the Smiths is coming up! June 14th. 

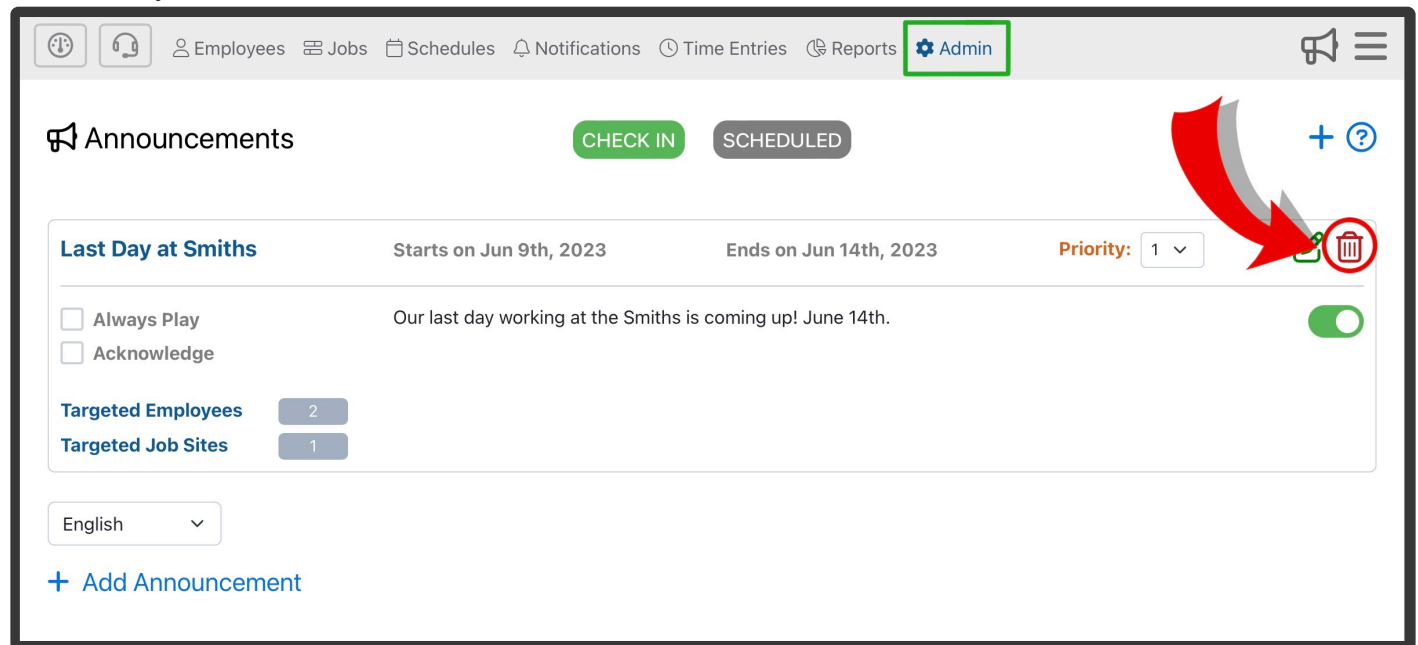
Targeted Employees 2 **Targeted Job Sites** 1

English 

[+ Add Announcement](#)

3.9.4.3. Deleting Announcements

To manually delete an Announcement, click on the red Delete button .



The screenshot displays the 'Announcements' section of the Telephone Timesheets Admin interface. The top navigation bar includes icons for a clock, headset, and menu, followed by links for Employees, Jobs, Schedules, Notifications, Time Entries, Reports, and Admin (highlighted with a green box). The main content area shows an announcement titled 'Last Day at Smiths' with a status of 'CHECK IN' and 'SCHEDULED'. The announcement details include the start and end dates (Jun 9th, 2023 to Jun 14th, 2023), a priority of 1, and a description: 'Our last day working at the Smiths is coming up! June 14th.' There are checkboxes for 'Always Play' and 'Acknowledge', and a toggle switch for 'Always Play' which is currently turned on. Below the announcement, there are buttons for 'Targeted Employees' (2) and 'Targeted Job Sites' (1). At the bottom, there is a language dropdown set to 'English' and a '+ Add Announcement' button. A red arrow points to the red Delete button (trash icon) in the top right corner of the announcement card.

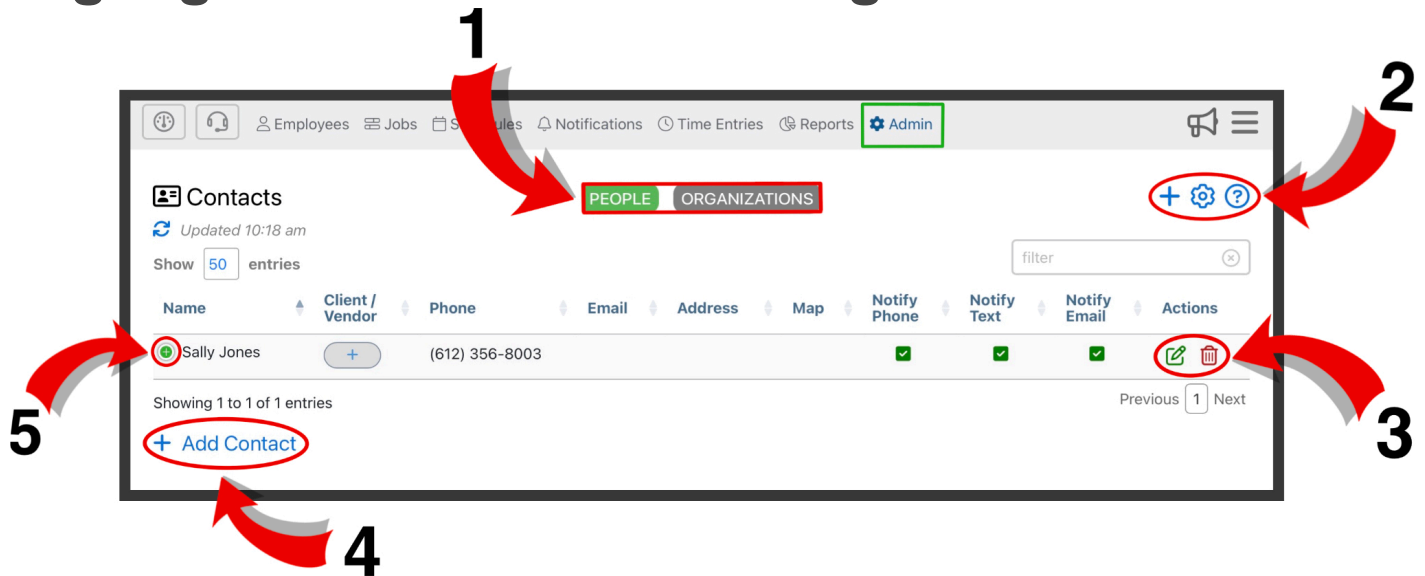


3.9.5. Contacts




Telephone Timesheets supports two types of contact records:

- People
- Organizations:


Highlights of the Contacts Page




1. Contacts are organized into 3 different categories; People and Organizations. You can filter Contacts using these tabs

2. Here you can add a Contact , adjust settings , and find additional information about the employee page .

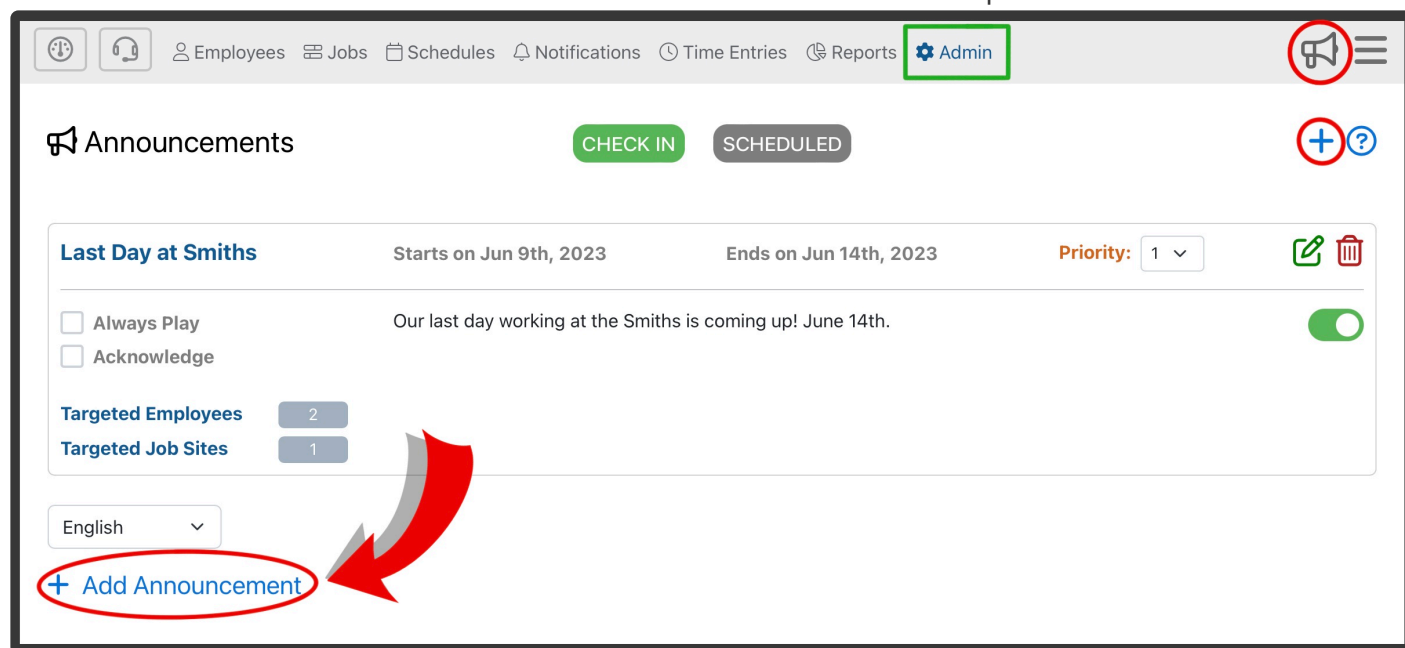
3. Here you can edit contacts  and delete contacts 

4. Here, you can add a new contact. This has the same function as the blue plus sign  in the upper right corner.

5. Here you can expand a users contact information by clicking the  icon.

3.9.5.1. Adding Contacts

You can create a new contact by either using the **+** icon in the upper right corner or use the **+ Add Announcement** in the lower left corner of the Contacts section of the portal.



This will bring you to the **Add Contact/Organization** form where you can enter the Contact/Organization Name, Organization Type, Contact Info, and other details.

Highlights of These Forms:

Contact Form

First Name

First name of the contact. It is OK to have more than one contact with the same first name.

Last Name

Last name of the contact. It is OK to have more than one contact with the same last name.

Display Name

When entering a contact's first and last name, their display name will auto-fill. However, you can enter a custom display name in this field. This is especially useful if you have 2 contacts with the same first and last name. For example, if you have two contacts with the name James Smith, but one of them goes by Jim and the other goes by Jimmy, you could customize their display names to be Jim Smith and Jimmy Smith.

✿ You can change the Display Name to "last, first" format by going to Admin—> Settings—> Portal Preferences and checking the box labeled "Display Name as Last, First"

External ID

An External ID is that is already in use in an external system, such as a payroll system. The External ID can be entered here manually or in some cases the External ID can be synced automatically with a third party system (e.g. ADP).

Phone Number

This is where you can add your contacts mobile number. This is used to get ahold of your contact via call, text, or click-to-call/text.

Email Address

This is where you can add your contacts email. This is used to get ahold of your contact via email or click-to-email.

Notes

Here, you can create any notes that may be important information relating to this contact.

Add Address

This is where you are able to add a contacts address. In order to do so you will need to click [add address +](#) to add a field for an address. This is optional if you'd like to store this information in Telephone Timesheets.

Enable Phone Notifications

When enabled, you will be able to notify a contact via phone call. If this option is disabled, you will not be able to notify that contact via phone call.

Enable Text Notifications

When enabled, you will be able to notify a contact via text message. If this option is disabled, you will not be able to notify that contact via text.

Enable Email Notifications

When enabled, you will be able to notify a contact via email. If this option is disabled, you will not be able to notify that contact via email.

Organizations Form

Organizations are used to organize individual contacts into groups. Organizations can be either clients or vendors.

Name

Here, you enter the organization's name.

Type

Here, you select whether the organization is a client or a vendor. Categorizing organizations is useful for reports.

External ID

An External ID is that is already in use in an external system, such as a payroll system. The External ID can be entered here manually or in some cases the External ID can be synced automatically with a third party system (e.g. ADP).

Phone Number

This is where you can add your contacts mobile number. This is used to get ahold of your contact via call, text, or click-to-call/text.

Email Address

This is where you can add your contacts email. This is used to get ahold of your contact via click-to-email.

Notes

Here, you can create any notes that may be important information relating to this contact. For example, if multiple contacts are linked to an organization, you can note who to contact first.

Add Address

This is where you are able to add an organization's address. In order to do so you will need to click [add address +](#) to add a field for an address.

Base Pay/Bill Rate

This is the rate which will be used when calculating the client/vendor pay amount when no job-specific rates are defined for this organization.

Enable Phone Notifications

When enabled, you will be able to notify that organization via phone call. If this option is disabled, you will not be able to notify them via phone call.


Enable Text Notifications

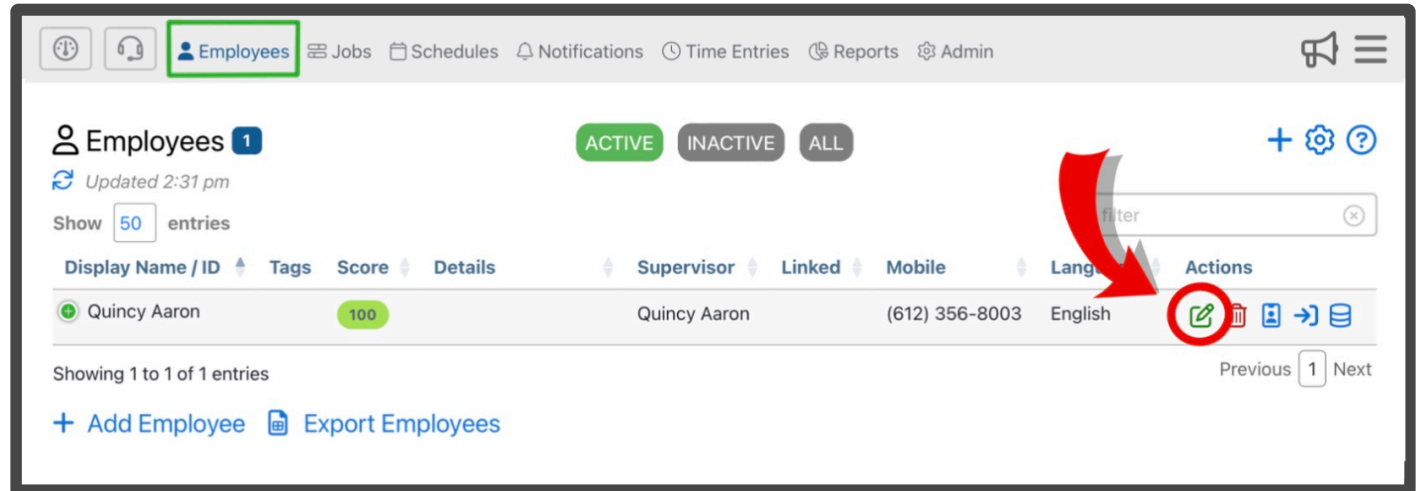
When enabled, you will be able to notify that organization via text message. If this option is disabled, you will not be able to notify them via text.


Enable Email Notifications

When enabled, you will be able to notify that organization via email. If this option is disabled, you will not be able to notify them via email.


3.9.5.2. Editing Contacts

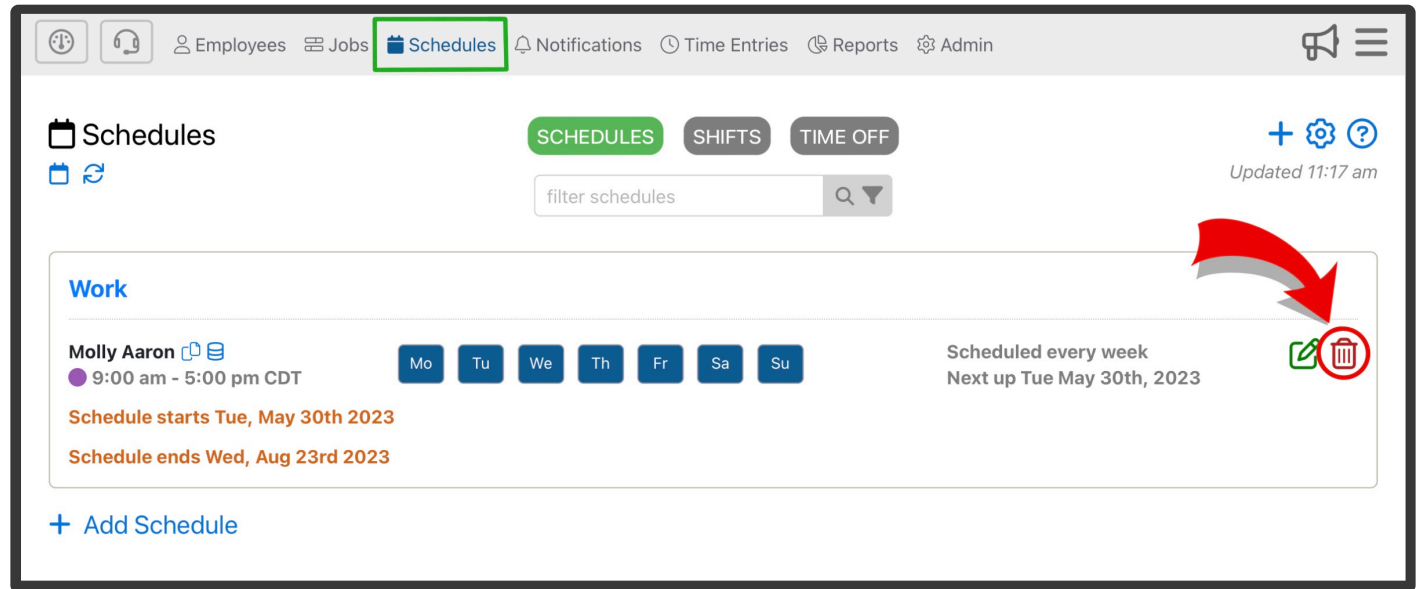
You can edit an organization/contacts information by clicking on the green edit button  in the Actions column for that contact. This will bring you to the **Edit Contact/Organization** form. Here you can modify any contact information. This will have the same fields as the Add Contact/Organization form. Go to the [Adding Contact](#) section of the manual to learn more about the form.



* If you do not see the green Edit button, it is because the screen is too small and you will need to expand that entry by first clicking on the green plus icon  immediately to the left of the entry.

3.9.5.3. Deleting Contacts

To manually delete an Contact, click on the red Delete button  in the Action column for that contact entry in the table.



The screenshot displays the 'Schedules' management interface. The top navigation bar includes icons for clock, headset, and menu, followed by links for Employees, Jobs, Schedules (highlighted), Notifications, Time Entries, Reports, and Admin. Below the navigation bar, the 'Schedules' section is active, showing tabs for SCHEDULES, SHIFTS, and TIME OFF. A search bar labeled 'filter schedules' is present. The main content area is titled 'Work' and lists a schedule for 'Molly Aaron' with a 9:00 am - 5:00 pm CDT shift. The schedule is active from Tuesday, May 30th, 2023, to Wednesday, August 23rd, 2023. A red arrow points to the delete button (trash icon) in the action column of the schedule entry.



3.9.6. Stations

Stations are used when employees are required to clock in from a stationary device at the location, rather than using their mobile phone. Any device that supports a modern web browser can be setup as a Station. e.g. Windows PC, Chromebook, iPad, Mac, etc.

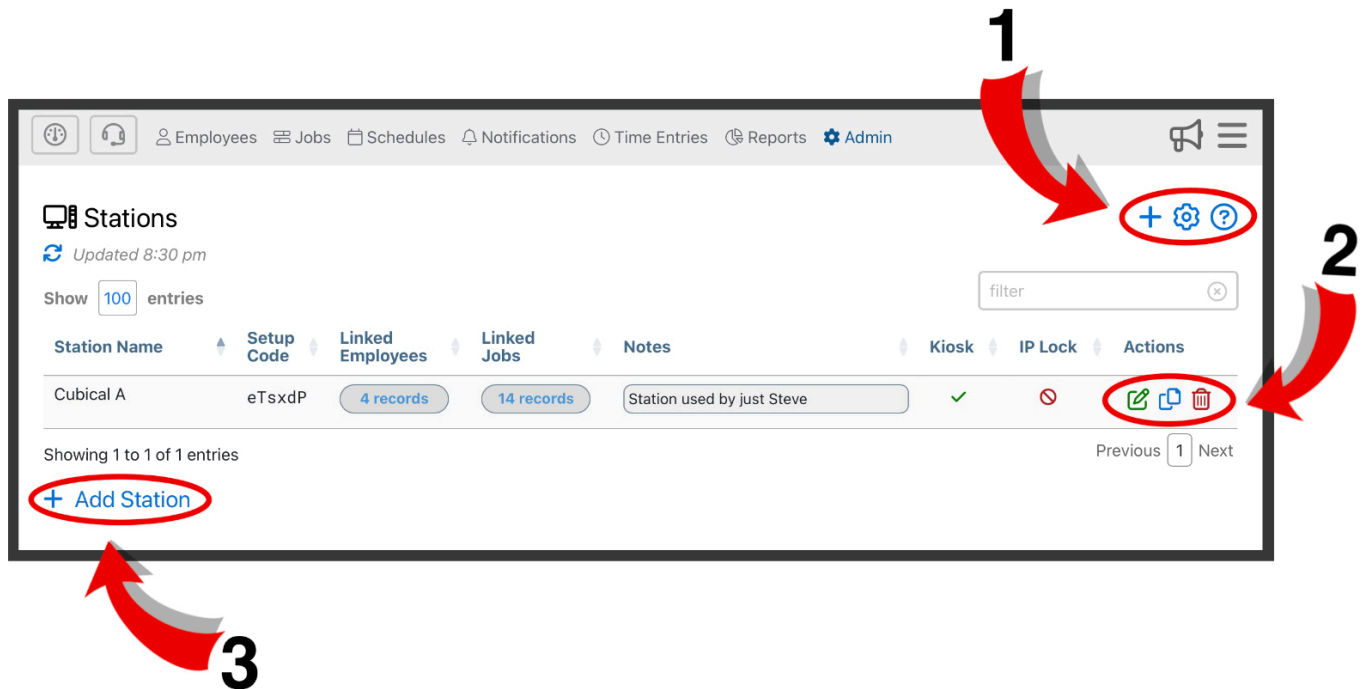
There are two types of Stations:

1. Kiosks Mode. Kiosk mode is for stations that are located in a common area (e.g. front lobby desk) and are used by multiple employees to clock in and out. Anytime an employee walks up to the kiosk and clicks on one of the action buttons (Check In, Check Out, Start Break, End Break) they will be prompted to identify themselves, either by selecting their name from a list of authorized employees, or by entering their employee PIN. Once the employee clocks in, the station returns to the kiosk home screen to allow the next employee to use the station. This makes it so that no employee-specific information is visible on a communal kiosk.




If an employee checks in via kiosk, they will be able to view their personal information through the employee web app. This includes shift summaries, the ability to add checkpoints and reports, etc. Employees will not be able to start/end breaks or end their shift from the employee portal if they have checked in from a kiosk.


2. Personal Mode. Personal mode is for stations that will only be used by one employee at a time. Because the station is only used by one employee at a time, the station is able to display employee-specific information like their schedule information, timesheet history, etc. The station is locked to that employee until that employee clocks out. This is unlike the Kiosk mode where employee-specific information can only be used to clock in, take breaks, and clock out. Once one employee has clocked out, a new employee is able to use this station.

Highlights of the Stations Page:



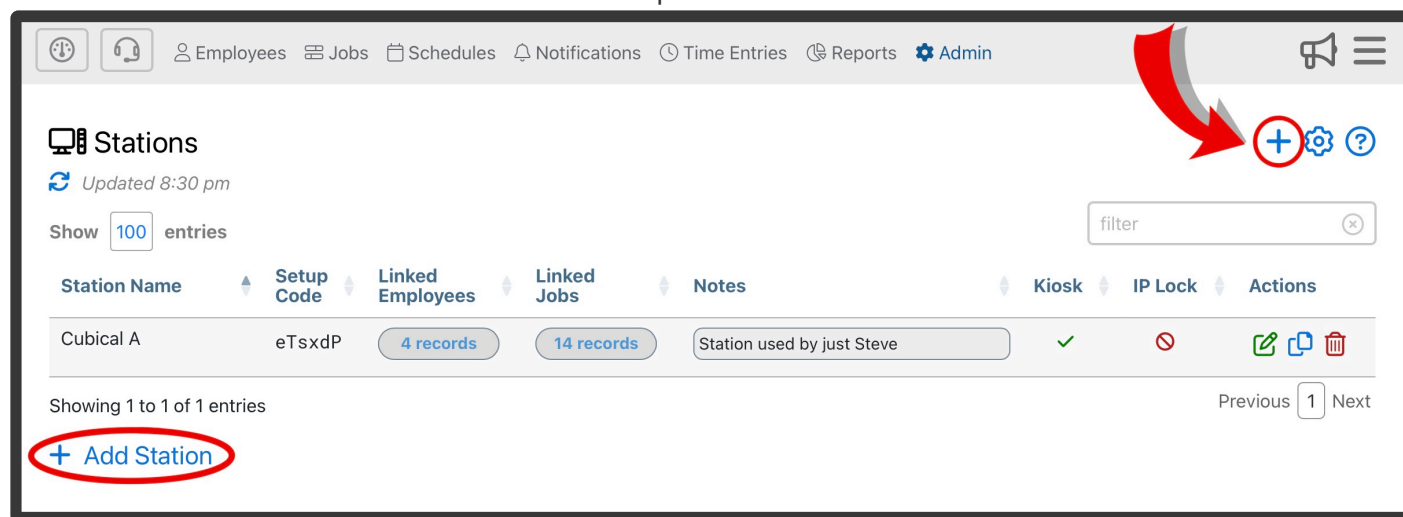
1. Here you can add a station , adjust settings , and find additional information about the stations page .

2. Here you can edit stations , clone a preexisting station , and delete stations .

3. Here, you can add a new station. This has the same function as the blue plus sign  in the upper right corner.

3.9.6.1. Adding Stations

You can create a new Station by either using the **+** icon in the upper right corner or use the **+ Add Station** in the lower left corner of the Stations section of the portal.



This will bring you to the **Add Station** form where you can enter the Station Name, Linked Jobs and Employees, and other station details.

Highlights of This Form:

Station Name

Here, the title to the station is entered. Stations are often named my location or job site

Allowed Employee:

Here, you are able to select the employees which are allowed to check in/out using this station. By default, all active employees will be allowed to use this station. You must individually select the employees you give permission to using this station.

Allowed Jobs

Here, you are able to select the jobs which are available for check in/out using this station. By default, all active jobs will be available at this station. You must individually select the jobs you employees will be able to check in/out of at this particular station.

Notes

Here, you can create any notes that may be important information relating to this station.

Admin Pin (advanced options)

The admin pin is used to ensure only admin are given access to the Admin Menu for this station. This pin must only contain numbers and can be up to 10 digits.

IP Address/CIDR (advanced options)

IP addresses can be used to identify the location of the station device. For example, an iPad with IP address 24.59.21.115 can be created as a Station with the name “Site #3”. No setup is required on that iPad other than to open its browser and enter this link <https://timeclock.telephonetimesheets.com>. The fact that the traffic is coming from that specific IP address allows our system to know which station settings to use.

If you have multiple stations locations within a given area, you can assign multiple IP Addresses using the CIDR block. This makes all the stations connected to that CIDR block the exact same. For example, if there are multiple iPads connected to the CIDR block 27.56.91.235, they will all appear as the same station. This allows employees to check in from any station within a given area.

✿ For more information on how to setup a station using an IP Address, go to the [On-Site Station Setup](#) section of the manual.

Enable kiosk mode (advanced options)

When enabled, your station can be used by multiple employees simultaneously. Kiosk mode is for stations that are located in a common area (e.g. front lobby desk) and are used by multiple employees to clock in and out. If this feature is disabled, it will act as a personal station.

✿ To learn more about Kiosk stations and Personal stations, go the the [Stations](#) section of the manual

Use PIN pad for employee selection (advanced options)


When enabled, employees must enter a PIN code when selecting an employee during check in/out via station. This ensures employees are only able to check in/out for themselves and not other employees. When disabled, a list of employees is displayed. 10-digit phone numbers, external IDs, and employee PIN codes may be entered.

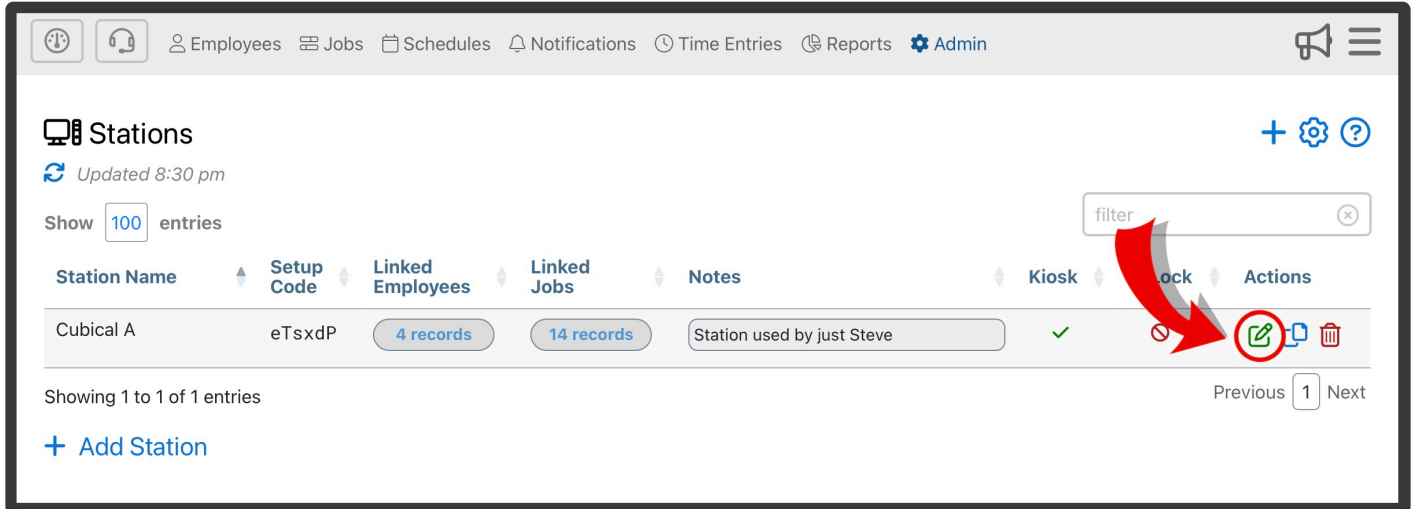
Use PIN pad for job selection (advanced options)

When enabled, employees must enter a PIN code when selecting what job they are assigned to during check in/out via station. This ensures employees are only able to check in/out for specific jobs. When disabled, a list of jobs is displayed. When selecting a job via PIN pad, they must enter the job code assigned to that job.




✿ To find more information on job codes in the [Adding Jobs](#) section of the manual.

3.9.6.2. Editing Stations


You can edit stations by clicking on the green edit button  in the Actions column for that station. This will bring you to the **Edit Station** form. Here you can modify any station details. This will have the same fields as the Add Station form. Go to the [Adding Stations](#) section of the manual to learn more about the form.

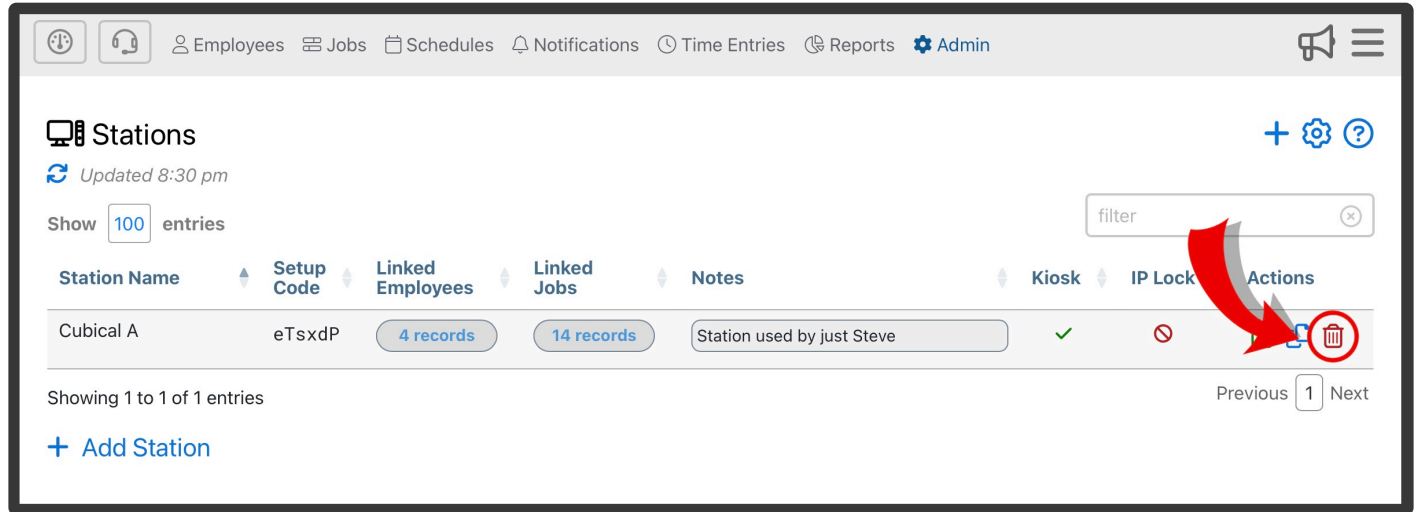


The screenshot displays the 'Stations' management page. At the top, there's a navigation bar with icons for various functions and a list of menu items: Employees, Jobs, Schedules, Notifications, Time Entries, Reports, and Admin. Below this, the 'Stations' section is titled with a refresh icon and the text 'Updated 8:30 pm'. A 'Show 100 entries' filter is present. The main table has columns: Station Name, Setup Code, Linked Employees, Linked Jobs, Notes, Kiosk, Lock, and Actions. The first row shows 'Cubical A' with setup code 'eTsxDP', 4 linked employees, 14 linked jobs, and a note 'Station used by just Steve'. The 'Kiosk' column has a green checkmark, and the 'Lock' column has a red lock icon. The 'Actions' column contains three icons: a green edit icon (highlighted with a red circle and a red arrow), a blue copy icon, and a red trash icon. At the bottom, it says 'Showing 1 to 1 of 1 entries' and includes a '+ Add Station' button.


Station Name	Setup Code	Linked Employees	Linked Jobs	Notes	Kiosk	Lock	Actions
Cubical A	eTsxDP	4 records	14 records	Station used by just Steve	✓	🔒	  

3.9.6.3. Deleting Stations

To manually delete a Station, click on the red Delete button .



The screenshot displays the 'Stations' management page. At the top, there's a navigation bar with icons for various functions and a list of menu items: Employees, Jobs, Schedules, Notifications, Time Entries, Reports, and Admin. Below this, the 'Stations' section is titled with a refresh icon and the text 'Updated 8:30 pm'. A 'Show 100 entries' dropdown is present. A search filter box is located on the right. The main table has columns: Station Name, Setup Code, Linked Employees, Linked Jobs, Notes, Kiosk, IP Lock, and Actions. The first row shows 'Cubical A' with setup code 'eTsxdP', 4 linked employees, 14 linked jobs, and a note 'Station used by just Steve'. The 'Actions' column for this row contains a red trash icon, which is highlighted by a red arrow. At the bottom, there's a pagination bar showing 'Showing 1 to 1 of 1 entries' and a '+ Add Station' button.

Station Name	Setup Code	Linked Employees	Linked Jobs	Notes	Kiosk	IP Lock	Actions
Cubical A	eTsxdP	4 records	14 records	Station used by just Steve	✓	✗	



3.9.6.4. On-Site Station Setup

One of the main advantages of having employees clock in at a station is that you know exactly where the station is. This way you don't need to rely on the employee's phone for GPS.

There are 2 ways to verify the location of your station:

1. By IP Address. IP addresses can be used to identify the location of the station device. For example, an iPad with IP address 24.59.21.115 can be created as a Station with the name "Site #3" with one allowed job called "Site #3 Job". No setup is required on that iPad other than to open its browser and enter this link <https://timeclock.telephonetimesheets.com>. The fact that the traffic is coming from that specific IP address allows our system to know which station settings to use.

✿ To find your IP address, open your browser and search "What is my IP address?". This will show you your IP address for that specific device.

2. By Station Code. If the IP address method is not an option, the station can be setup manually by an administrator by opening the device's browser to <https://timeclock.telephonetimesheets.com/#/station> and entering the 6-digit station setup code. The location of stations can be trusted, as only an authorized administrator has the ability to enter the unique setup code. The unique setup code for each station is displayed on the Stations page in the administrative portal.

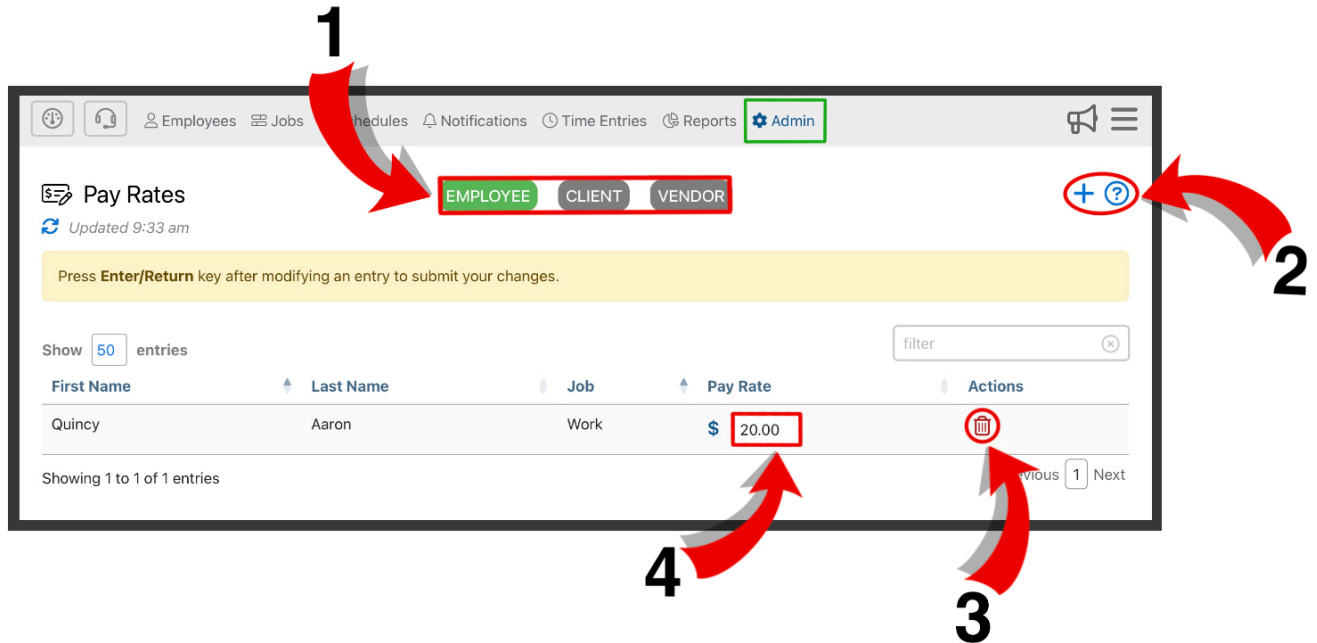
The screenshot displays the 'Stations' management interface. At the top, there's a navigation bar with icons for various system functions and an 'Admin' link. Below this, the 'Stations' section is titled, showing it was 'Updated 8:30 pm'. A 'Show 100 entries' dropdown and a search filter are present. The main table lists station details. The 'Setup Code' for 'Cubical A' is 'eTsxDP', which is highlighted with a red rectangle. Other details include '4 records' for linked employees, '14 records' for linked jobs, and a note 'Station used by just Steve'. The 'Kiosk' status is checked, and 'IP Lock' is disabled. Action icons for edit, copy, and delete are shown. At the bottom, it indicates 'Showing 1 to 1 of 1 entries' and provides a 'Previous 1 Next' pagination control, along with an '+ Add Station' button.

Station Name	Setup Code	Linked Employees	Linked Jobs	Notes	Kiosk	IP Lock	Actions
Cubical A	eTsxDP	4 records	14 records	Station used by just Steve	✓	✗	[Edit] [Copy] [Delete]

3.9.7. Bill / Pay Rates

You can create more detailed employee pay rates on the Bill/Pay Rates page. You can create job-specific bill/pay rates for employees, clients, and vendors. This information will be visible in certain types of reports. In order to create a employee, client, or vendor bill/pay rate, you will need to be its corresponding tab.

Highlights of The Bill/Pay Rates Page



1. Bill/pay rates are organized into 3 different categories; Employee, Client, Vendor. You can filter bill/pay rates using these 3 tabs

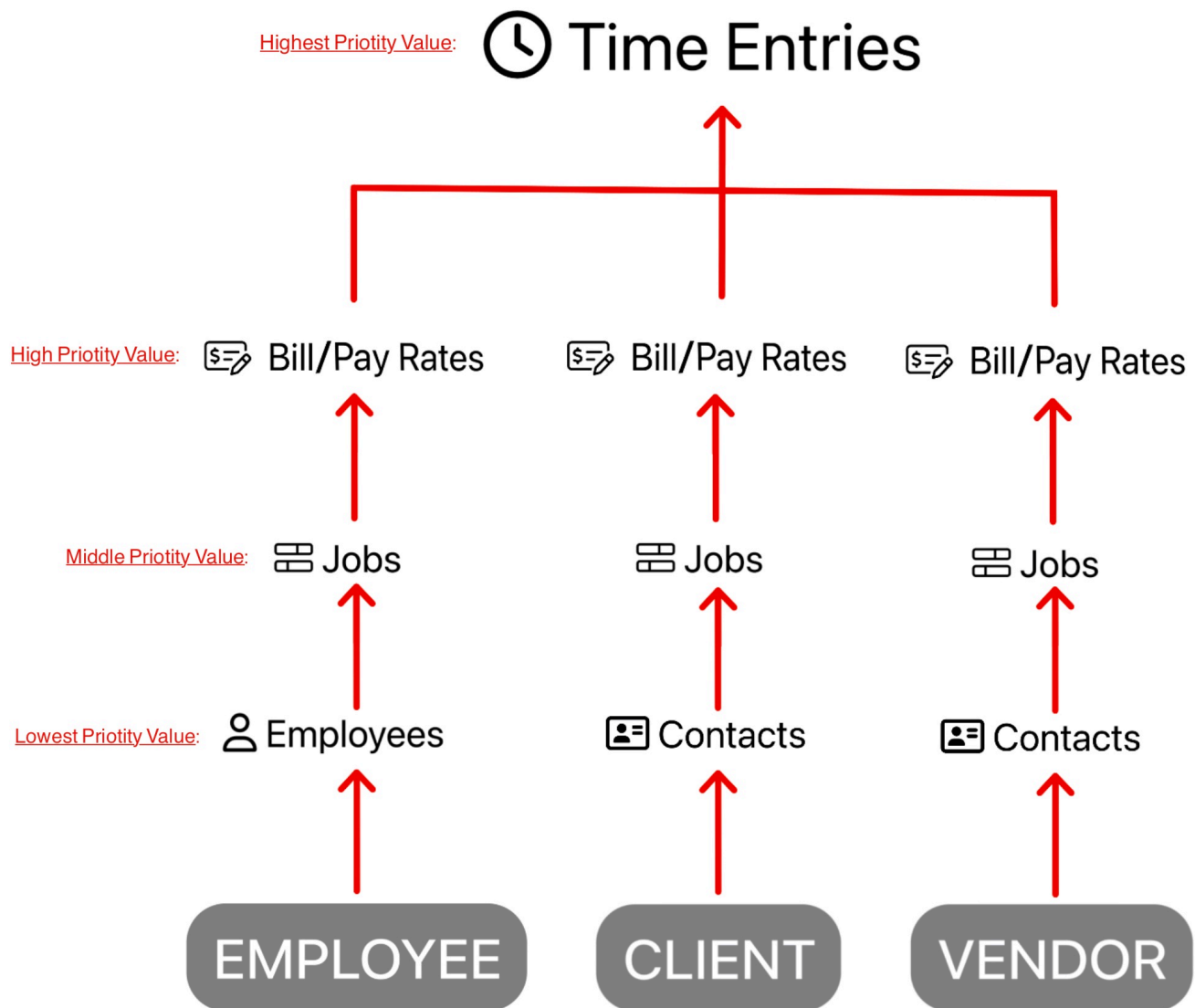
2. Here you can add a bill/pay rate  and find additional information about the Bill/Pay Rates page .

3. Here, you can delete bill/pay rates .

4. Here, you are able to edit the rate for any bill/pay rate record. Make sure you press Enter/Return to save your changes to the bill/pay rate.

3.9.7.1. Bill/Pay Rates Hierarchy

Bill/pay rates can be established in many different places within the Admin Portal. Because of this, Telephone Timesheets has a hierarchy system to determine what to bill/pay employees, clients, and vendors.



Employees (lowest priority value)

In the Employee section of the Admin Portal, you are able to establish employee base pay rates. If no other pay rates are assigned in higher priority valued sections of the portal, the employee base pay rate will be in use. Pay rates assigned to employees in the Jobs, Time Entries, or Bill/Pay Rates section of the Admin Portal override the pay rates established in the Employee section of the portal.

Contacts (lowest priority value)

In the Contacts section of the Admin Portal, you are able to establish client bill rates and vendor pay rates. If

no other bill/pay rates are assigned in higher priority valued sections of the portal, the client or vendor bill/pay rate assigned in Contacts will be in use. Bill/pay rates assigned to clients or vendors in the Jobs, Time Entries, or Bill/Pay Rates section of the Admin Portal override the bill/pay rates established in the Contacts section of the portal.

Jobs (middle priority value)

In the Jobs section of the Admin Portal, you are able to establish job-specific employee pay rates, client bill rates, and vendor pay rates. If no other bill/pay rates are assigned in higher priority valued sections of the portal, the job-specific employee, client, and vendor bill/pay rate will be in use. Bill/pay rates assigned to that employee, client, or vendor in the Bill/Pay Rates or Time Entries section of the Admin Portal override the bill/pay rates established in the Jobs section the portal.


Bill/Pay Rates (high priority value)

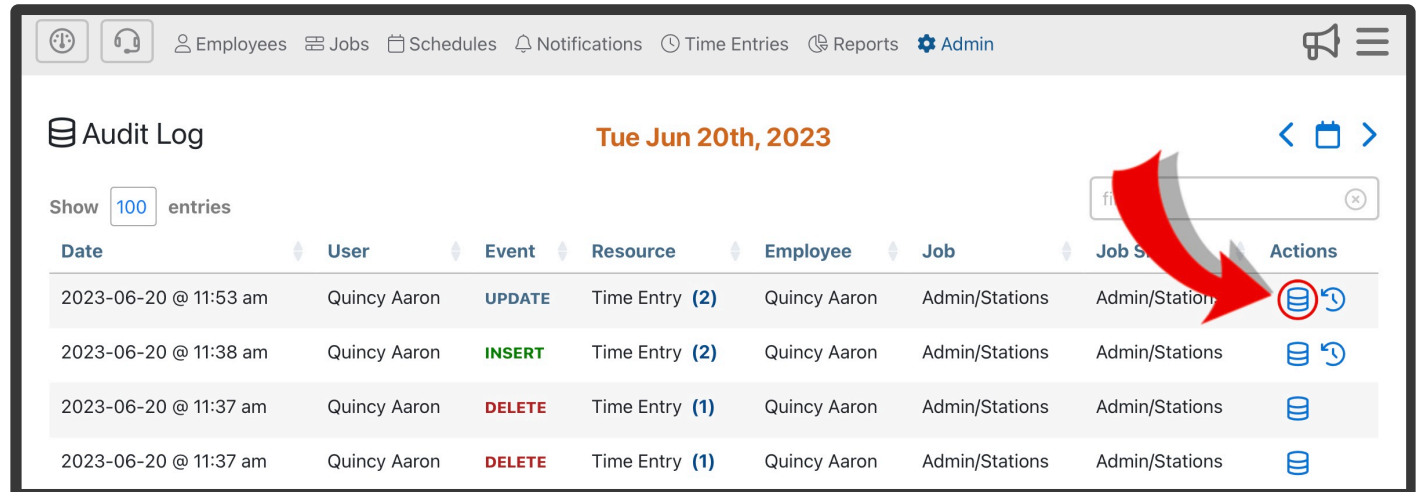
In the Bill/Pay Rates section of the Admin Portal, you are able to establish employee pay rates, client bill rates, and vendor pay rates. If no other bill/pay rates are assigned in higher priority valued sections of the portal, the employee, client, and vendor bill/pay rate assigned in this section will be in use. Bill/pay rates assigned to that employee, client, or vendors in the Time Entries section of the Admin Portal overrides the bill/pay rates established in the Bill/Pay Rates section of the portal.





Time Entries (highest priority value)

In the Time Entries section of the admin portal, you are able to establish the bill/pay rate for employees, clients, and vendors. Any bill/pay rate that is established here overrides any established rates in the Employees, Jobs, or Bill/Pay Rates section of the portal.

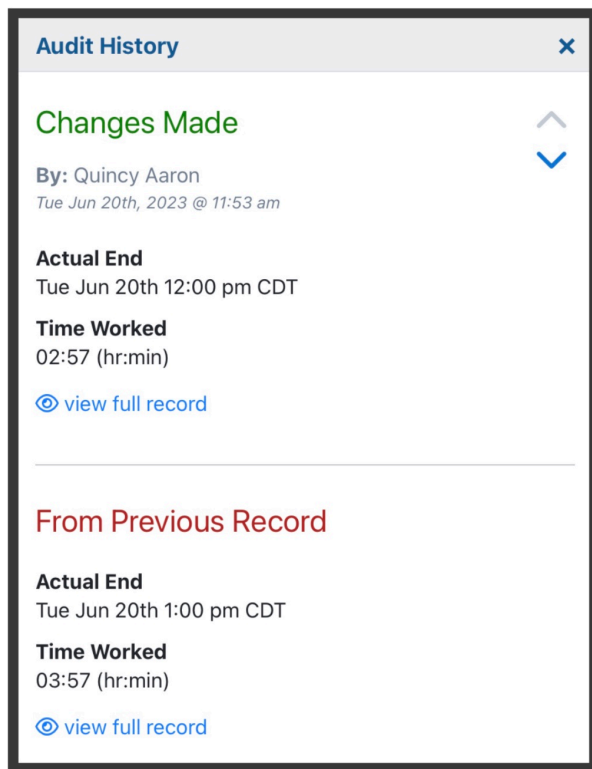
3.9.8. Audit Log

Anytime an Administrator makes changes within the Admin Portal a permanent log entry is created. You can view all log entries in the Audit Log section of the Admin Portal. You can view more details for each log entries using the  icon in the actions column.



Date	User	Event	Resource	Employee	Job	Job S	Actions
2023-06-20 @ 11:53 am	Quincy Aaron	UPDATE	Time Entry (2)	Quincy Aaron	Admin/Stations	Admin/Stations	
2023-06-20 @ 11:38 am	Quincy Aaron	INSERT	Time Entry (2)	Quincy Aaron	Admin/Stations	Admin/Stations	
2023-06-20 @ 11:37 am	Quincy Aaron	DELETE	Time Entry (1)	Quincy Aaron	Admin/Stations	Admin/Stations	
2023-06-20 @ 11:37 am	Quincy Aaron	DELETE	Time Entry (1)	Quincy Aaron	Admin/Stations	Admin/Stations	

In the Audit History window, you compare changes made to log entries. In the below example, you can see that the Actual End was changed from 1PM to 12PM. This means that an administrator changed the hours worked after the Time Entry was recorded. Keeping track of changes in the Audit Log helps ensure accurate data.



Audit History

Changes Made

By: Quincy Aaron
 Tue Jun 20th, 2023 @ 11:53 am

Actual End
 Tue Jun 20th 12:00 pm CDT

Time Worked
 02:57 (hr:min)

[view full record](#)

From Previous Record

Actual End
 Tue Jun 20th 1:00 pm CDT

Time Worked
 03:57 (hr:min)

[view full record](#)

3.9.9. Comm Log

A complete record of all inbound and outbound communications (both text and calls) can be viewed in the Comm Log.

The Comm Log can be used for situations where an employee calls into the system, but is unable to create a time entry.

For example, an employee repeatedly enters an invalid job code.

In those cases, you can use “IVR” call logs to see details of their call(s). This is helpful for troubleshooting things like an employee who got clocked in to the wrong job, or an employee who couldn't enter the right job code.

You can also view any click-to-call or click-to-text activity that takes place by viewing the “Agent” comm logs.

3.9.10. Change Password

Here you are able to create a new password to access the admin portal. Your password must be at least 8 characters long and include both letters and numbers.

Change Password

New Password


Confirm Password

Passwords must be at least 8 characters long and include both letters and numbers.

Cancel Update

3.9.11. Close Account

In order to permanently delete your account, go Admin —> Close Account.

 **Close Account**

☒ I understand that by selecting this checkbox and clicking the button below, I will be closing my Telephone Timesheets account.

Note: After clicking the button below you will be logged off and your account will be closed. Once your account is closed, you will no longer have access to this account and all of the data associated with the account will be **PERMANENTLY DELETED**. Upon closing your account, you will no longer receive any emails or billing charges from Telephone Timesheets.

Cancel Close Account

✿ If you choose to close your Telephone Timesheets account, you will be logged off and your account will be deleted. Once your account is closed you will no longer have access to your account, and all of the data associated with the account will be permanently deleted. After closing your account, you will no longer receive any emails or billing charges from Telephone Timesheets.

4. Employee Phone Clock-in System

As soon as you create a Telephone Timesheets account, you will be given a toll-free phone number for your employees to call.

This number is unique to your company and is for your exclusive use. Before employees are able to clock in, they must be enrolled into the system. To learn more about adding employees, go to the [Add Employees](#) section of the manual.

By default, employees are able to clock in via phone call 2 different ways:

- **Calls from the employee's own mobile phone:**

If the employee calls from their own mobile phone, in most cases they will hear "You have successfully checked in". Similarly, when they call back at the end of their shift, they will hear "You have successfully checked out".

- **Calls from land line telephones:**

If the employee calls from a land line phone, the employee will be prompted to enter their 10-digit mobile number. This allows our system to determine which of your employees is calling in. If they enter a 10-digit number that matches exactly with the information you have entered into the system, they will hear "You have successfully checked in". When they call back at the end of their shift, they will hear "You have successfully checked out".

4.1. Phone Clock-in: Customize How Employees Choose Jobs

Employees have two options for choosing a job when they clock in by making a phone call.

1. [Choose by Job Name](#)
2. [Choose by Job Code](#)

The default for the system is to use Job Name. This is what most customers use. However, if your employees are comfortable with entering Job Codes already, you can enable the use of Job Codes.


4.1.1. Phone Clock-in: Choosing By Job Name

By default, Telephone Timesheets goes through a series of evaluations to determine and automatically assign the correct job to the employee using the following data:

1. Schedule Data. If an employee is scheduled to do exactly one job at the time of their call, the system will automatically clock the employee in to that job. For example, employee Sally Jones is scheduled to work at the Franklin Building at 8:00AM on Fridays. If the system receives a call from Sally Jones around 8:00AM on a Friday, he will get clocked in automatically to the Franklin Building job.

2. Caller ID. If the employee is calling from a land line, and that land line is associated with exactly one job (e.g. Franklin Building job) then the employee will get clocked into the Franklin Building job.

In both of the above scenarios, the system was able to assign a job because there was no ambiguity about which job to assign. However, in some cases there will be ambiguity and the system will need more information in order to clock the employee in to the correct job. In those cases, the employee will be prompted to choose from a list of job names that will be read to them by the system. For example “Press 1 for job: Anderson Building” and “Press 2 for job: Franklin Building”

 Click [here](#) to hear what it sounds like.

4.1.2. Phone Clock-in: Choosing By Job Code

For companies that are accustomed to identifying jobs by a job code, administrators can enable the use of Job Codes for clocking in. Make sure your employees know the job codes before you enable job codes. Enabling Job Codes will change the behavior of the phone clock-in system and the web clock-in system. For phone clock-ins, employees will be prompted to “Please enter a job code followed by the pound key”.

✿ To enable the use of Job Codes, go to Admin—> Settings—> General Settings—> select “Use job codes”

General Settings

- ☒ Autocreate employees ⓘ
- ☒ Use job codes ⓘ
 - ☒ Allow default job ⓘ
 - ☒ Allow unscheduled jobs ⓘ
- ☒ Track budgeted time overage ⓘ
- ☐ Enable travel tracking ⓘ
- ☒ Enable IVR and SMS breaks ⓘ
- ☒ Require break confirmation ⓘ
- ☐ Allow employees to access the system using their external ID ⓘ
- ☒ Allow employee schedules to overlap ⓘ
- ☐ Send schedule change notifications to employees ⓘ

Cancel Save

Notice there are two additional checkbox options for how job codes are used; Allow Invalid Job Codes and Allow Unscheduled Jobs. Both of these options are enabled by default what job codes are in use.

1. Allow Invalid Job Codes. When enabled, employees are allowed to clock in even if they do not know the job code. If they fail twice to enter a valid job code, they will be clocked in to the system’s catch-all job named “Unassigned Job”. If this is unchecked, they will only be able to clock in if they enter a valid job code. If they enter invalid job codes or no job code at all, they will hear the following “You failed to enter a valid job code. Please contact your supervisor to retrieve a valid job code for your location”

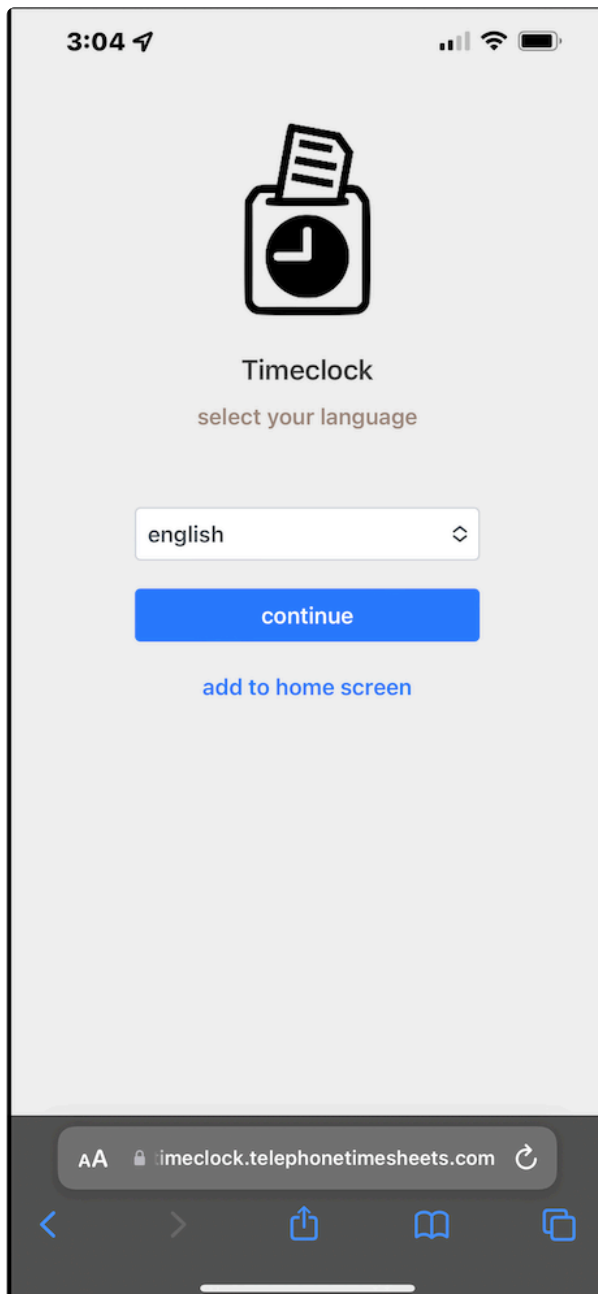
2. Allow Unscheduled Jobs. When this is checked, employees are allowed to clock in even if the job code they entered is for a job that is not scheduled. For example, job code 33 is a valid job code for a job that is only scheduled for Friday, the employee would still be allowed to clock in for that job on a Wednesday. However, if this option is unchecked, they will not be able to clock in for job code 33 until the schedule is updated. Rather, they will hear “There are no schedule entries at this time for the job code you entered. Please talk to your supervisor.”

5. Employee Web Clock-in System

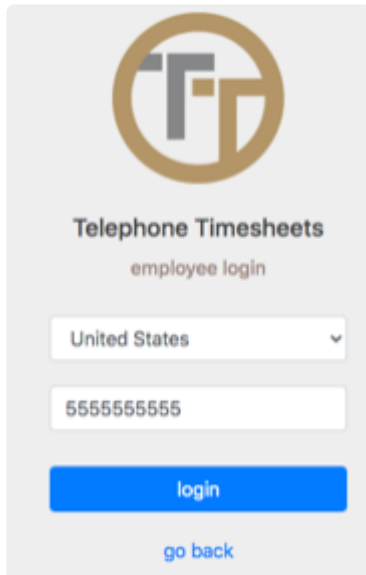
Employees who would prefer to clock in and out using a web portal can do so on their mobile phone. Employees can also save the web portal browser to their home screen.

How to use the web portal from a mobile phone:

1. Go to <https://timeclock.telephonetimesheets.com> using the browser on your smart phone.

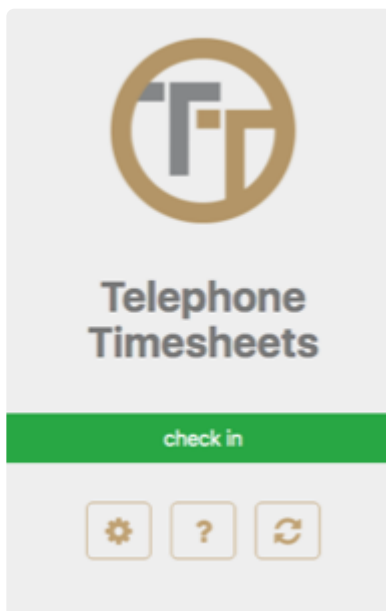


2. The employee will need enter their 10-digit mobile number and do a one-time validation. The system will validate the employee's mobile number by sending them a 6-digit code via text message.



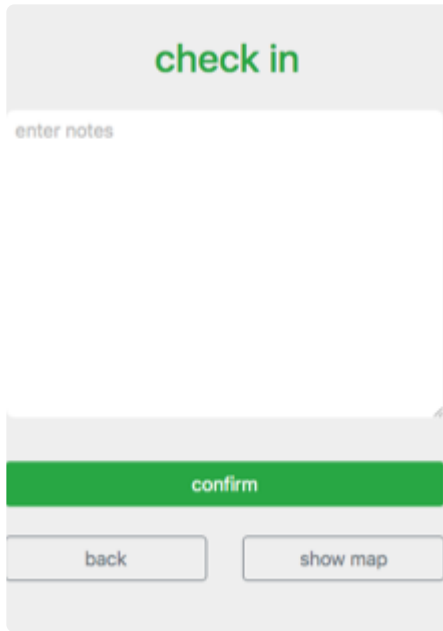
The image shows the 'employee login' screen for Telephone Timesheets. At the top is a circular logo with a stylized 'TT' in gold and grey. Below the logo, the text 'Telephone Timesheets' is in bold, and 'employee login' is in a smaller font. There is a dropdown menu showing 'United States' with a downward arrow. Below that is a text input field containing '5555555555'. A blue 'login' button is positioned below the input field, and a 'go back' link in blue text is at the bottom.


3. After the one-time validation is complete, employees can now check in. Location will be shared automatically as they check in.

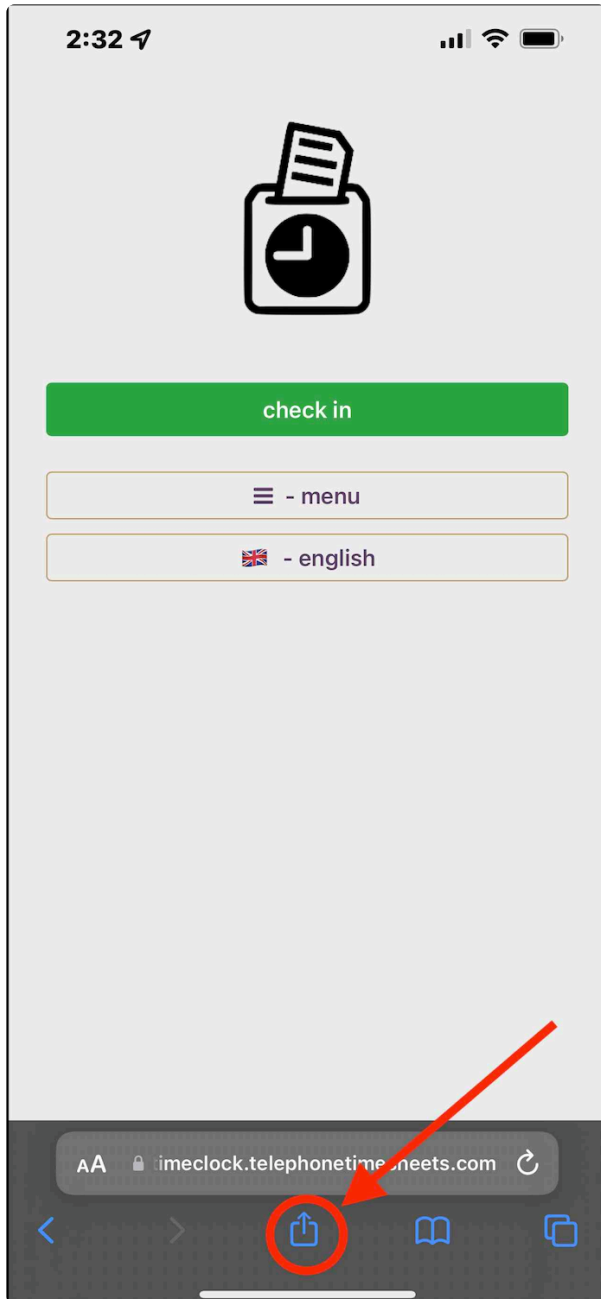


The image shows the 'check in' screen for Telephone Timesheets. At the top is the same circular logo as the login screen. Below the logo, the text 'Telephone Timesheets' is in bold. A green bar with the text 'check in' in white is positioned below the text. At the bottom, there are three square icons in a row: a gear (settings), a question mark (help), and a circular arrow (refresh).

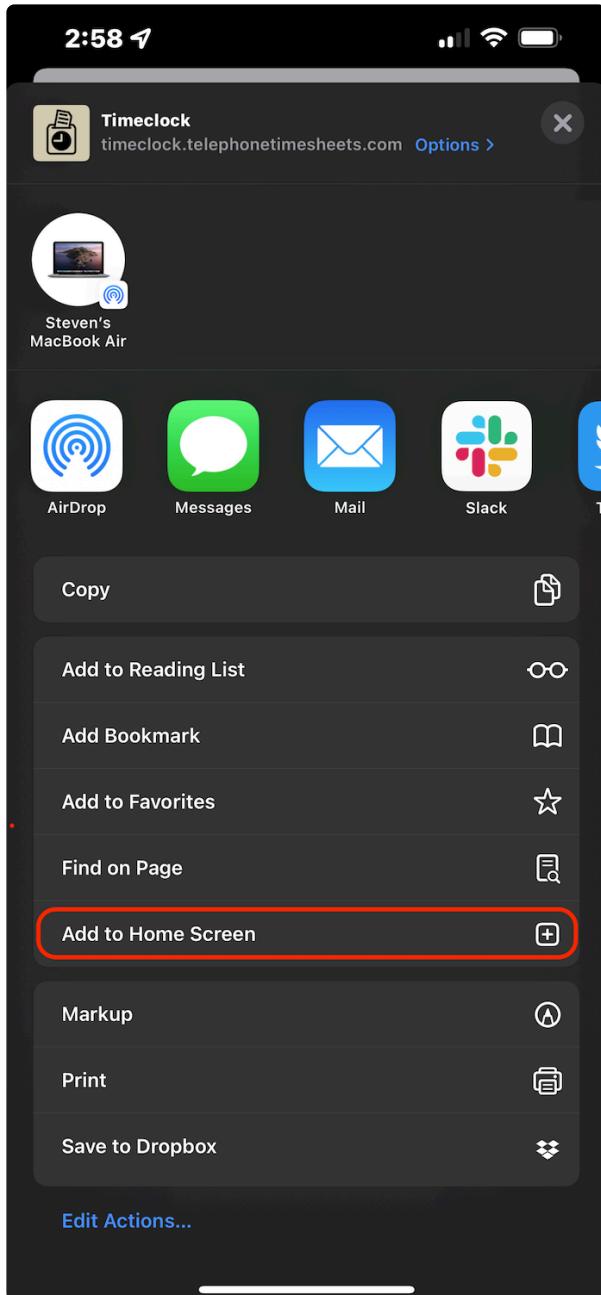
4. Employees have the option to add notes. These notes are visible to the administrator in the “Time Entries” section of the admin portal

A mobile application interface for checking in. At the top, there is a grey header bar with the text "check in" in green. Below the header is a large white text area with the placeholder text "enter notes" in grey. At the bottom of the screen, there is a green bar with the word "confirm" in white. Below this bar are two white buttons with grey borders: "back" on the left and "show map" on the right.

For quick access to the web portal, employees can add the web portal to their home screen. To add the web portal to the home screen of an iPhone, start by clicking on the  icon at the bottom of the screen as shown here.



Scroll down and click on the **“Add to homescreen”** button.



To add the web app to the home screen of an Android phone, follow these steps:

1. Launch "Chrome" app.
2. Open the website or web page you want to pin to your home screen.
3. Tap the menu icon (3 dots in upper right-hand corner) and tap Add to homescreen.
4. You'll be able to enter a name for the shortcut and then Chrome will add it to your home screen.

5.1. Web Clock-in: Customize How Employees Choose Jobs

Employees have two options for choosing a job when they clock in. Only one of

1. [Choose by Job Name](#)
2. [Choose by Job Code](#)

The default for the system is to use Job Name. This is what most customers use. However, if your employees are comfortable with entering Job Codes already, you can enable the use of Job Codes.

5.1.1. Web Clock-in: Choosing By Job Name

By default, the system is setup to show employees a list of nearby jobs, whether they are scheduled for the jobs or not.

The employee can see a list of all jobs they are linked to by clicking on the “All” tab.

Optionally, you can enable filtering of the list of jobs to only show jobs that are scheduled for the employee. You can enable this filter under Admin—> Account—> Configure Employee App

5.1.2. Web Clock-in: Choosing By Job Code

For companies that are accustomed to identifying jobs by a job code, administrators can enable the use of Job Codes for clocking in. Make sure your employees know the job codes before you enable job codes. Enabling Job Codes will change the behavior of the web portal clock-in system. For web portal clock-ins, employees will be prompted to enter the job code for the job they are clocking in for.

✿ To enable the use of Job Codes, go to Admin—> Settings—> General Settings—> select “Use job codes”

General Settings

- ☒ Autocreate employees ⓘ
- ☒ Use job codes ⓘ
 - ☒ Allow default job ⓘ
 - ☒ Allow unscheduled jobs ⓘ
- ☒ Track budgeted time overage ⓘ
- ☐ Enable travel tracking ⓘ
- ☒ Enable IVR and SMS breaks ⓘ
- ☒ Require break confirmation ⓘ
- ☐ Allow employees to access the system using their external ID ⓘ
- ☒ Allow employee schedules to overlap ⓘ
- ☐ Send schedule change notifications to employees ⓘ

Cancel Save

Notice there are two additional checkbox options for how job codes are used; Allow Invalid Job Codes and Allow Unscheduled Jobs. Both of these options are enabled by default what job codes are in use.

1. Allow Invalid Job Codes. When enabled, employees are allowed to clock in even if they do not know the job code. If they fail twice to enter a valid job code, they will be clocked in to an “Unassigned Job”. If this is unchecked, they will only be able to clock in if they enter a valid job code. If they enter invalid job codes or no job code at all, they will hear the following “You failed to enter a valid job code. Please contact your supervisor to retrieve a valid job code for your location”

2. Allow Unscheduled Jobs. When this is checked, employees are allowed to clock in even if the job code they entered is for a job that is not scheduled. For example, job code 33 is a valid job code for a job that is only scheduled for Friday, the employee would still be allowed to clock in for that job on a Wednesday. However, if this option is unchecked, they will not be able to clock in for job code 33 until the schedule is updated. Rather, they will hear “There are no schedule entries at this time for the job code you entered. Please talk to your supervisor.”

6. Two-way Voice Communication System

Telephone Timesheets two-way voice communication system is used for human-to-human phone calls. For example, an outbound call from a supervisor to an employee, or an inbound call from an employee, or client, or vendor. Telephone Timesheets will route all of these calls, record them, transcribe them, and log them.

Two-way voice communication is accessible through many sections of the Admin Portal:

 Employees

 Contacts

 Time Entries

7. Two-way Text Communication System

The two-way text communication system enables communication between employees in the field, and supervisors, dispatchers, and other back-office admins. This includes messages like “Hey boss, I am stuck in traffic and will be 30 minutes late today!”.

The advantage of using this system to communicate include:

- Supervisors, dispatchers, and back-office admins do **not** have to use their cell phones for texting. Rather, the employee sends texts to the same toll-free number they call everyday to clock in and out.
- All text communication is logged in the Telephone Timesheets admin portal.
- Any text communication to or from an employee **who is on the clock** will also get attached to their time entry.

Here's how it works:

1. Each supervisor can choose to have employee emails forwarded. They can also limit this to only **their** employees by editing the supervisor record using the checkboxes highlighted in this screen shot.

Frank Jones

First Name

Last Name

External ID

Mobile Number

US

(612) 555-0006 ✓

Outbound Click-to-Call Phone ⓘ (optional)

US

Email Address (optional)

Supervisor Role

Secondary Supervisor ▼

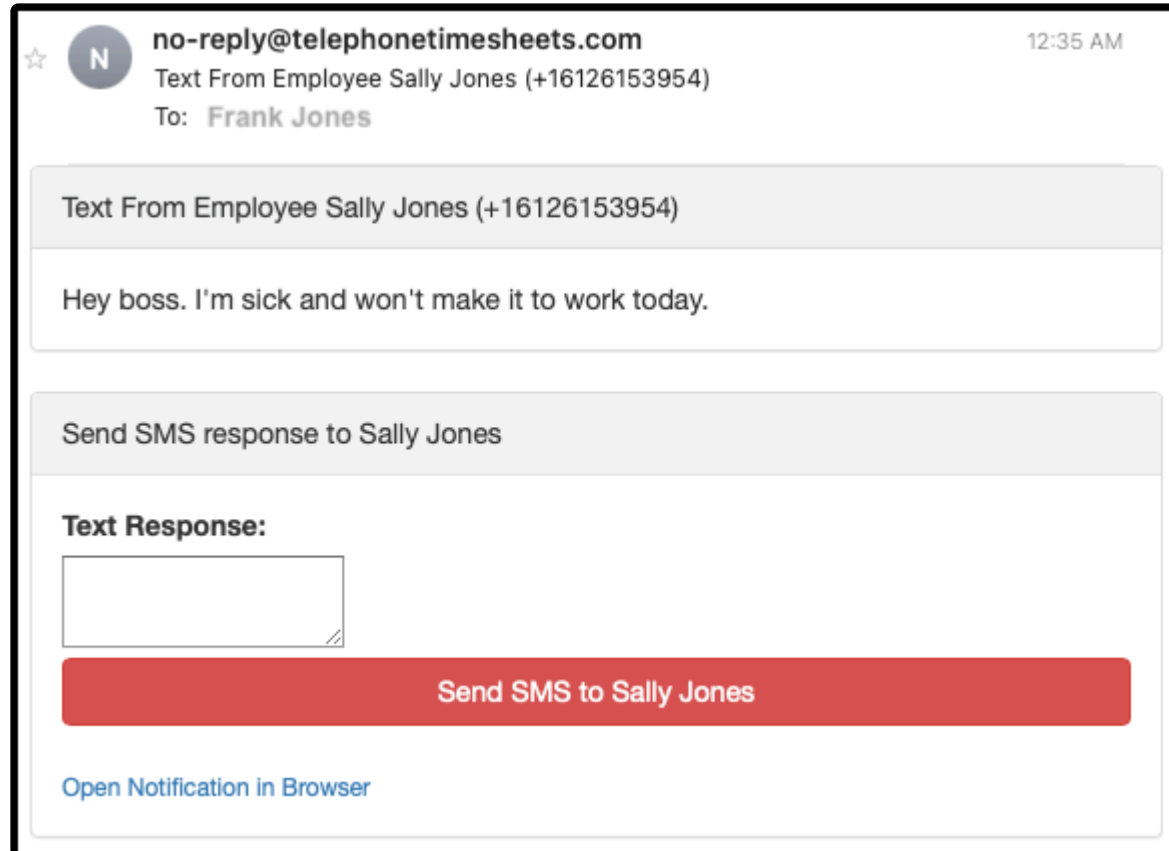
☒ **Relay employee text messages to this supervisor** ⓘ

☐ From all employees
☒ Only from employees assigned to this supervisor

Cancel

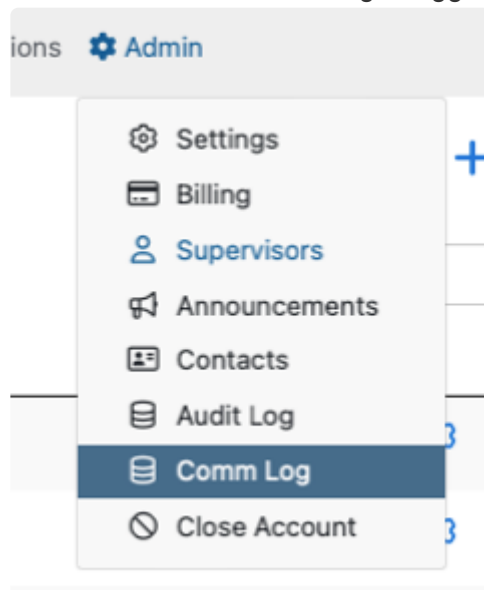
Save

2. When we forward a text message to the supervisor, we include a “Reply” button in the body of the email, making it easy for them to reply.



The screenshot shows a mobile-style interface for a text message. At the top, there's a header bar with a star icon, a circular profile picture with the letter 'N', the email address 'no-reply@telephonetimesheets.com', and the time '12:35 AM'. Below this, it says 'Text From Employee Sally Jones (+16126153954)' and 'To: Frank Jones'. The main body of the message is a light gray box containing the text 'Text From Employee Sally Jones (+16126153954)' and 'Hey boss. I'm sick and won't make it to work today.' Below the message body is a section titled 'Send SMS response to Sally Jones'. Inside this section, there's a label 'Text Response:' followed by a text input field. Below the input field is a large red button labeled 'Send SMS to Sally Jones'. At the bottom of the section is a blue link that says 'Open Notification in Browser'.

3. All text communications get logged to the communications log found under Admin —> Comm Log



The system also supports an automated text-based chatbot that employees can use to interact with Telephone Timesheets.

This allows the employee to make requests such as “start my break” or “send me my schedule”.

Here's how it works:

Employee schedule inquiry Employees can text the letter 's' to Telephone Timesheets at any time to receive a listing of their schedule for the current pay period. In the United States and Canada, employees send a text message to the same toll-free number that they normally call.

Employee break start/end

Employees can text the letter 'b' to Telephone Timesheets at any time to start or end a break.

Employee hours worked inquiry

Employees can text the letter 't' to Telephone Timesheets any time to receive a report of the hours they have worked. Our system uses your payroll reports to determine the pay period- if you do not have any recent payroll reports, we'll send them the hours worked in the last 30 days. To view hours for the previous pay period, employees can text 'tp' . In the United States and Canada, employees send a text message to the same toll-free number that they normally call.



NOTE: In the United Kingdom, toll-free numbers cannot receive text messages, so employees will need to send hours worked inquiry text messages and schedule inquiry text messages to +44 20 3322 3496. This is a dedicated UK number that Telephone Timesheets uses for both sending and receiving text messages.

8. Frequently Asked Questions

The following sections contain frequently asked questions broken down by the following categories.

[Free Trial & Sign Up](#)

[Pricing & Billing](#)

[Setup & Daily Operations](#)

Please submit feedback to the FAQ and we will update the Q&A section accordingly.

8.1. Free Trial & Sign Up

Do you offer a free trial?

Yes. All new customers get to use the system for 30 days for free. We never charge for the first month. You do not have to enter any credit card information to use the free trial. Sign up takes about 60 seconds. The free trial is 100% functional and unlimited use. If you decide you want to become a paying customer, just enter your billing information sometime prior to the end of the trial. You can enter billing information at any time. You will not be billed for the first month regardless of when you enter your billing information.

What happens at the end of the free trial period?

If you want to use the system, you will need to enter a credit card by the end of the 30 day trial period. We send a reminder at 2 weeks, 3 weeks, and the final day. If you don't enter your credit card information, your free trial account will automatically be removed. You will not be "pestered" by us after that. The first month is free so that customers can determine if our solution is a fit.

What information do I need to provide to sign up?

We ask for your email address and your mobile phone number. We do not share your information with anyone, ever.

8.2. Pricing & Billing

How much does the service cost?

In the US, the service is \$5 per active user, per month.

In the UK, it is £5 per active user, per month.

That's it. There are no fees, no taxes, and no add-on charges of any kind. Period.

What if I use advanced capabilities like QuickBooks Online integration, or custom reporting, or notifications for late employees. Will you charge more then?

No. There are no fees, no taxes, and no add-on charges of any kind. Period.

How do you define an “active user”?

Any employee who uses the system during the monthly billing period is counted as an active user. Also, all administrators of the system are considered a active users. You must have a primary administrator (the account owner who signs up for the service). You can also add secondary administrators who have access to the administrative portal to view and/or edit settings like employees, time entries, reports, etc. Both primary and secondary admins are counted as active users.

What if I have 100 employees, but only 50 of them are actively using the system?

You will only be charged for the employees who check in and out during your monthly billing cycle. There is no need to “prune” your employee list to save money. If your employees are not actively using the system, you will not be charged for them.

What if I only use the system seasonally? Can I “suspend” the service for the summer, for example?

Since we only bill for active users, you don't need to take any action to “suspend” service. If you don't have any employees checking in and out, you will only be billed for the administrative user(s).

What will my monthly billing cycle be?

Your monthly billing cycle is based on the day of the month you created your account. For example, if you created your account on the 9th, your billing date will be the 9th of every month.

Will you provide a detailed bill each month?

Yes, we will email the billing detail to the account owner by default. If you prefer, you can change the billing email address. You can also add additional billing email addresses.

What details are on the bill?

We will show you a list of all active users for the monthly billing cycle, listed by name. We'll add it up and show you the total charge for the month.

Do you store credit card information?

No. We use PayPal for recurring monthly billing. There is absolutely no credit card information stored in our systems. PayPal is responsible for the security of your credit card information.

8.3. Setup & Daily Operations

How long does it take to setup the system?

For many customers, there is no setup at all. The system is self-learning and will discover your employees automatically if you choose not to enter them in advance. However, if you choose to enter your employees & job sites in advance, this process usually takes less than 10 minutes, depending on the number of employees and job sites.

Can I import employee and customer data?

Yes. We support integration with QuickBooks Online and QuickBooks Desktop, ADP, WinTeam, and any other system that supports file-based or API-based data transfer.

Can employees check in using their mobile phones?

Yes. Any phone can call in to our system. If an employee checks in using their mobile phone, we will send them a text message with a link to click on to share their location. That location information gets recorded as a part of their time entry.

Does the system provide reports?

Yes. The system provides several report types, including daily summary reports by employee and job, as well as payroll reports. We also have the ability to create custom reports based on your specific needs. We do not charge for creating custom reports.

Can I manually edit timesheet entries?

Yes. The system allows you to create entries from scratch, or edit existing entries. For example, if an employee forgets to check out, you can manually enter their end time.

8.3.1. Land Line Support

Employees can call from any phone, including land line phones.

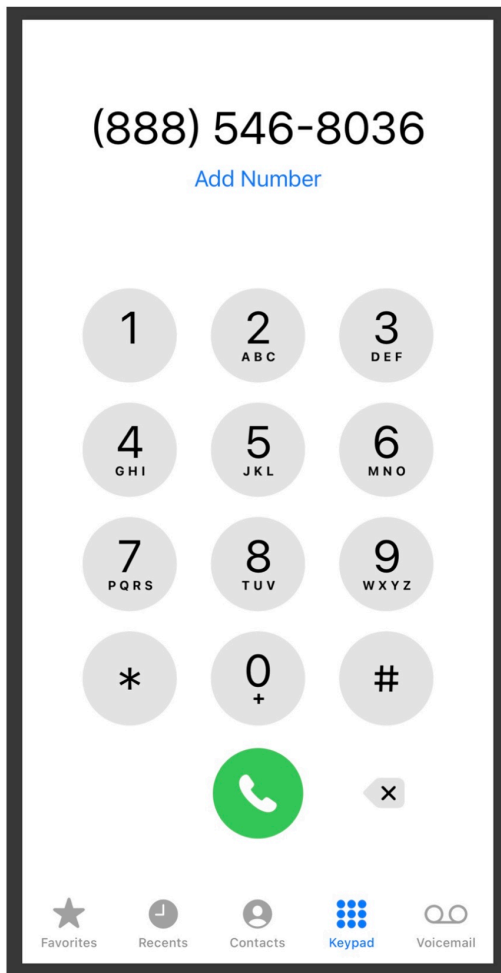
Whenever an employee calls from a land line phone, the system will ask them to enter their 10-digit mobile number. This is how the system knows which employee is calling.

Optionally, the system can prompt the employee to say their full name. This will be recorded and attached to their time entry for later review by an admin/supervisor to ensure that there is no “buddy punching” happening.

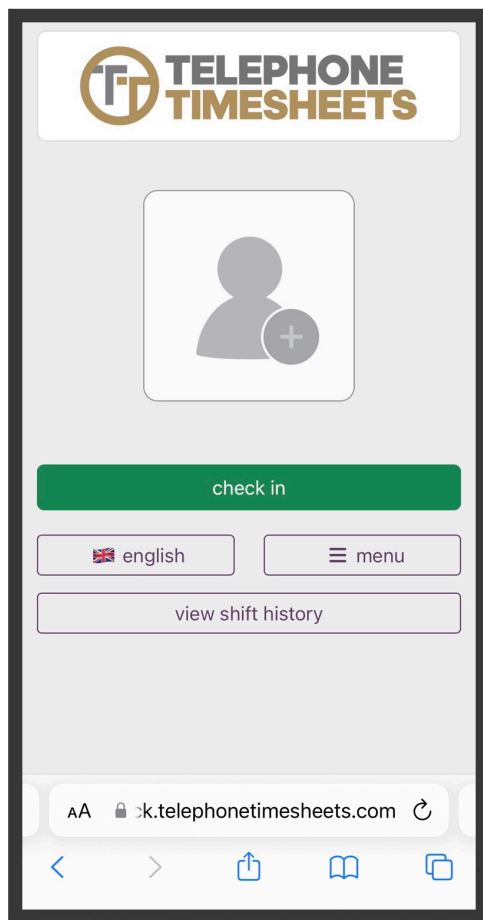
9. Employee Instructions

Employees are able to clock in via phone call or from the employee web app.

When clocking in via phone call, employees will need to call your company's 10-digit toll free number. Admin will need to send this number to their employees. To learn how to clock in via phone call, go to the [Employee Call-In Instructions](#) section of the manual.



When clocking in from the employee web app, employees will need to first access the web app from their internet browser at "link". The employee web app can be saved to your mobile phone home screen for easy access. The web app enables many more functions while clocked in, such as creating in shift reports, submitting checkpoints, viewing hours worked, etc. To learn how to clock in using the employee web app, go to the [Employee Web App Clocking In Instructions](#) section of the manual.



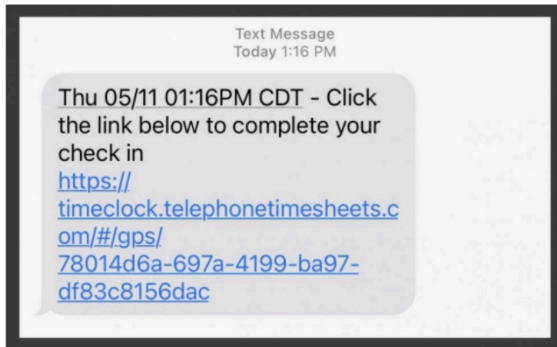
9.1. Employee Call-In Instructions

Here are the steps an employee typically goes through when calling in for the first time.

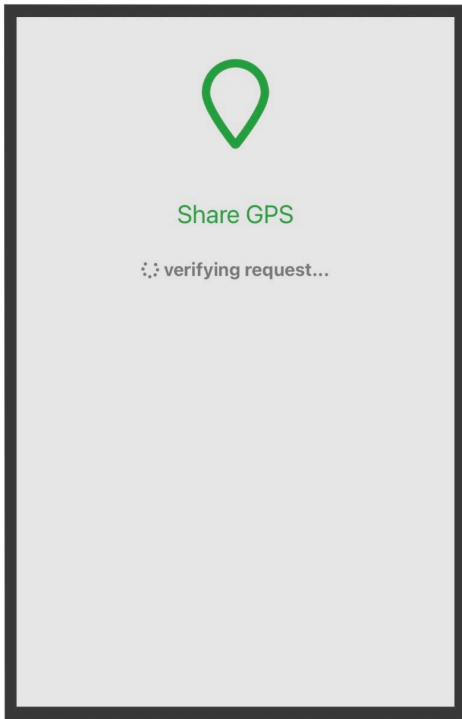
1. Call the designated toll-free number provided by your supervisor. If you are a new employee, you may be asked to confirm your mobile number and preferred language. After that, you will hear “You have successfully checked in”

* If you are new to the system, you will also be asked via text message to reply with your first and last name.

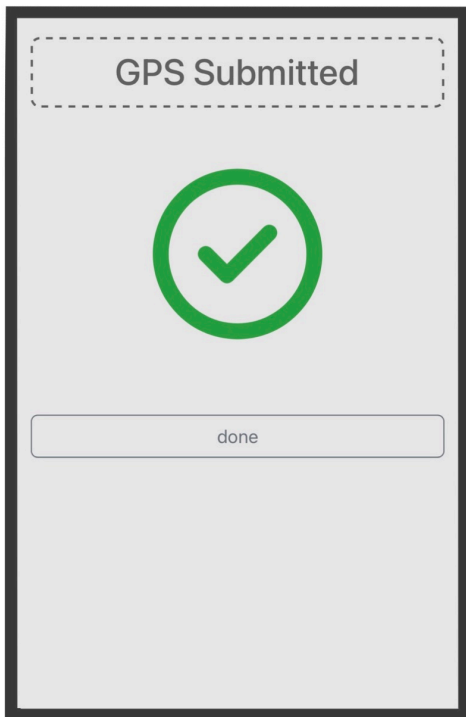
2. Check your text messages. If location sharing is required, you will receive a text message that looks like this. Click on the link to share your location. If you are new to the system, you will also be asked via text message to reply with your first and last name.



3. When you click on the location sharing link, you will see a confirmation page like this. You must click “Allow” to share your location. If you have blocked GPS location sharing on your personal device you will be unable to share your location. To learn how to unblock GPS, go to the [Details On Apple iOS Location Services](#) or [Details On Android Location Services](#) section of the manual.



4. Once your location has successfully been shared, you have completed the check in process. Simply repeat these steps again to check out.*

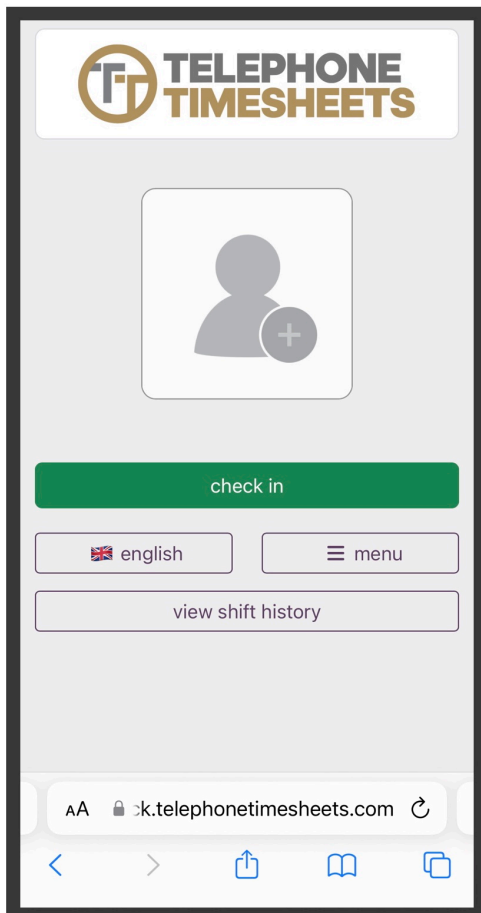



9.2. Adding The Employee Web App To Home Screen

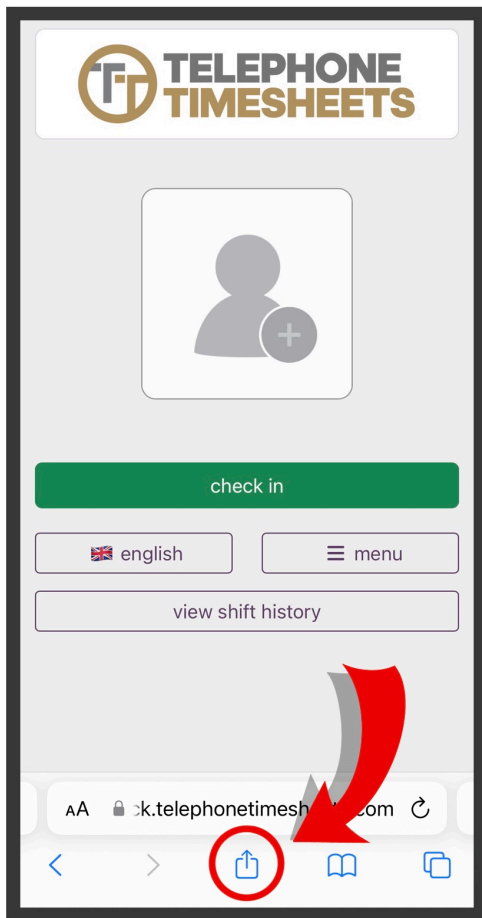
For employees that plan to consistently clock in using the Employee web app should add it to their mobile phone Home Screen for easy access.

Here are the steps employees should follow:

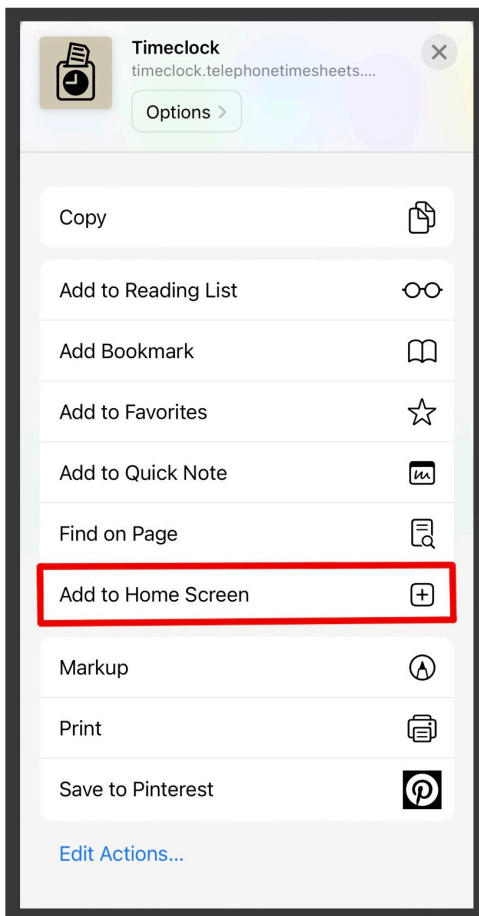
1. Go to <https://timeclock.telephonetimesheets.com> using the browser on your smart phone.



2. To add the web app to the home screen of a mobile phone, start by clicking on the  icon at the bottom of the screen as shown here.



3. Scroll down and click on the “Add to home screen” button. Now you will be able to access the Employee web app from your home screen.

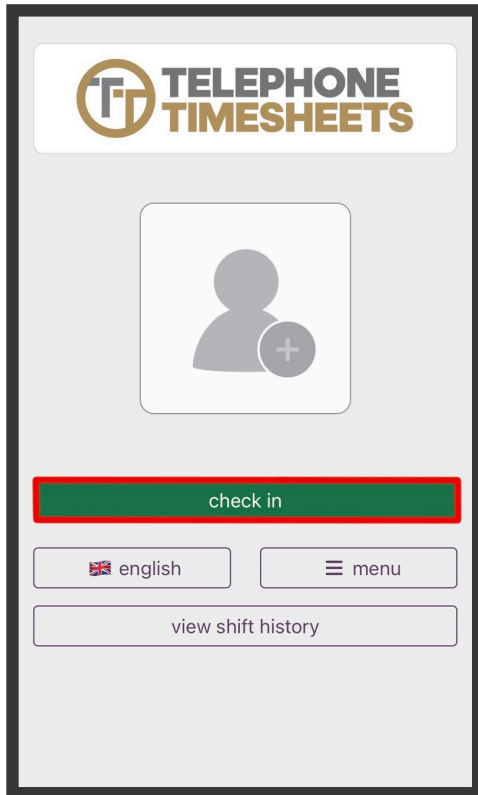


To add the web app to the home screen of an Android phone, follow these steps:

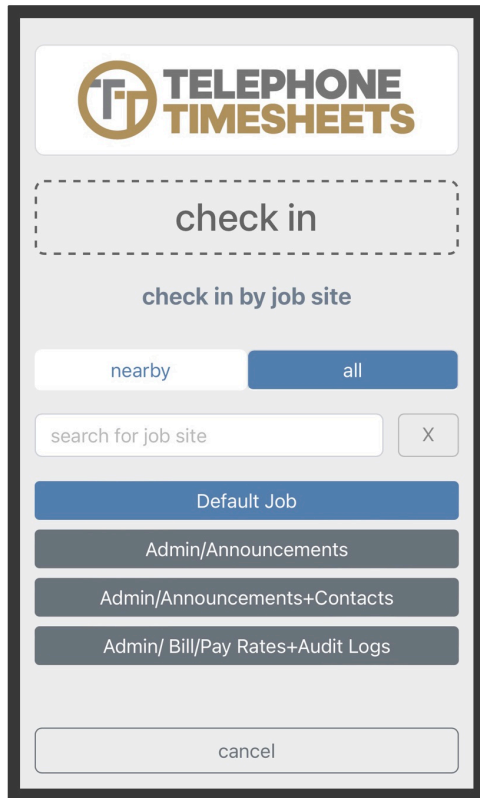
1. Launch "Chrome" app.
2. Open the website or web page you want to pin to your home screen.
3. Tap the menu icon (3 dots in upper right-hand corner) and tap Add to homescreen.
4. You'll be able to enter a name for the shortcut and then Chrome will add it to your home screen.

9.2.1. Employee Web App Clocking In Instructions

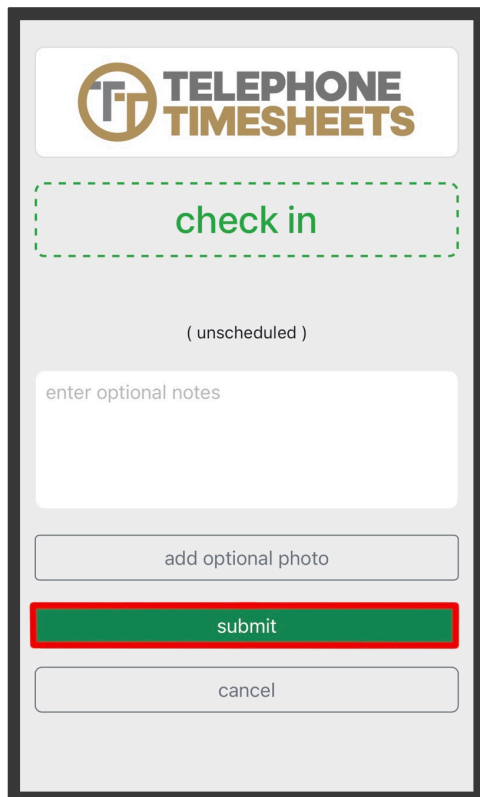
The employee web app provides a simple and fast clock in and out process. When clocking in, start by navigating to the Employee web app. Here you will be prompted to go check in.



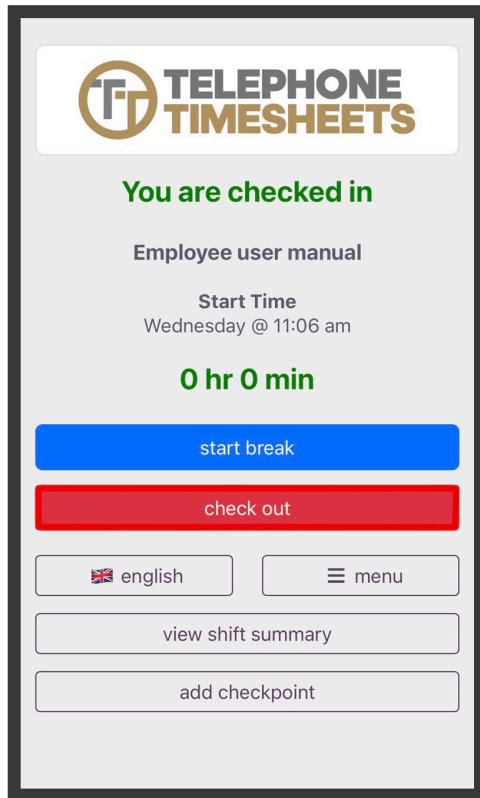
Next, you will need to select the job that you are working. Depending on how admin configure jobs and schedules, this page may look different.



After selecting the job you are clocking into, you can optionally write any check in notes you feel necessary. All check in notes are visible to admin. You must click submit to complete your check in.



You have successfully checked in. Once you are ready to clock out, start by clicking the check out button.



**TELEPHONE
TIMESHEETS**

You are checked in

Employee user manual

Start Time
Wednesday @ 11:06 am

0 hr 0 min

start break

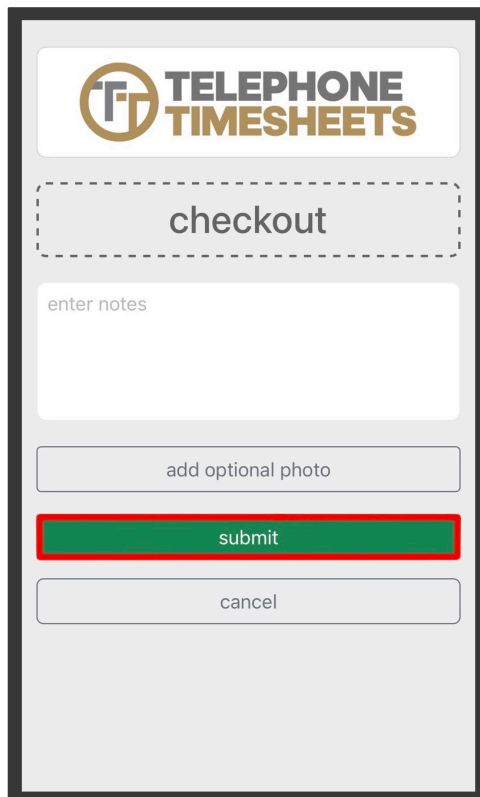
check out

english menu

view shift summary

add checkpoint

When checking out, you can optionally write any check out notes you feel necessary. All check out notes are visible to admin. You must click submit to complete your check out.



**TELEPHONE
TIMESHEETS**

checkout

enter notes

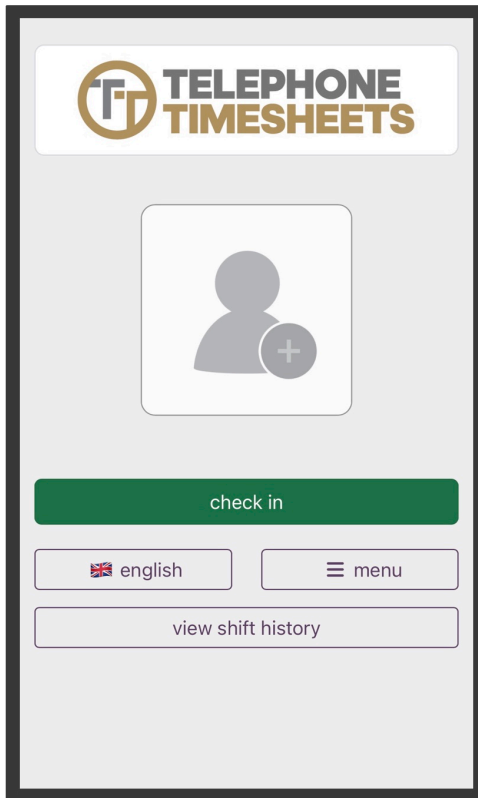
add optional photo

submit

cancel

You have successfully checked out. After check out you will be brought back to the Employee web portal

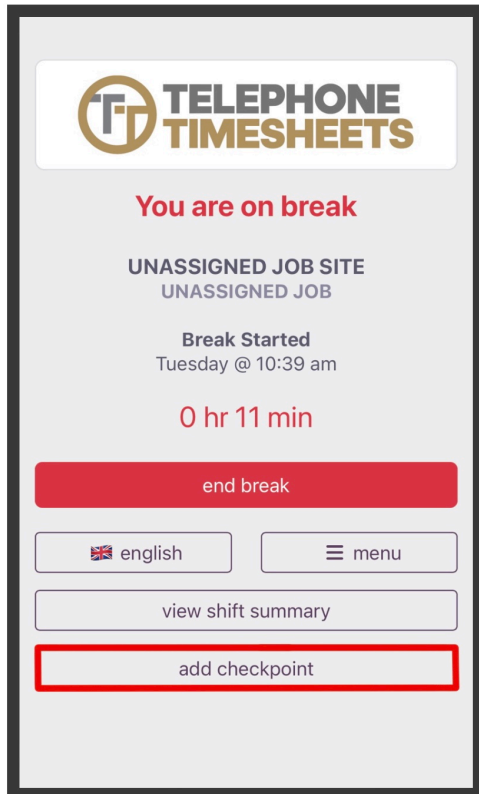
homepage.



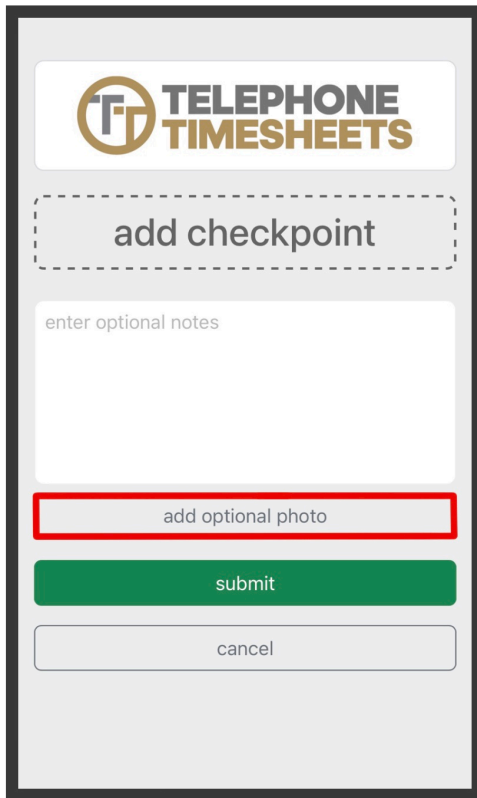
9.2.2. Submitting Checkpoints

Some jobs may require an employee to submit their location one or more times during a shift. With Checkpoints, an employee can update their location without clocking in/out of a job.

In order to submit a Checkpoint, you must first click **Add Checkpoint** from the employee web app.

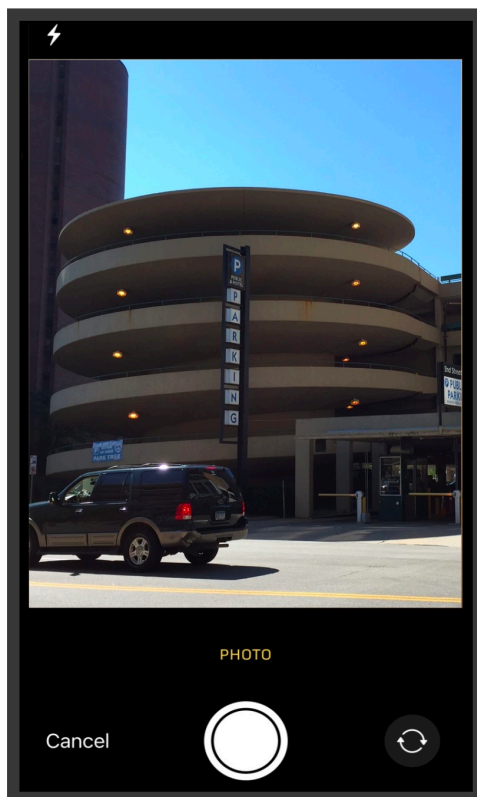


You will be brought to the Checkpoint page. Here you can enter any Checkpoint notes you feel necessary. Optionally, you can submit a Checkpoint photo.



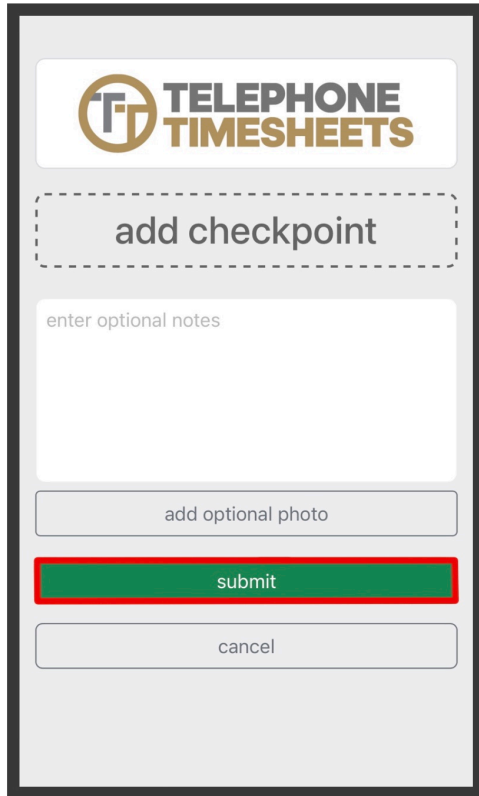
The screenshot shows a mobile app interface for adding a checkpoint. At the top is the 'TELEPHONE TIMESHEETS' logo. Below it is a dashed box containing the text 'add checkpoint'. Underneath is a text input field with the placeholder 'enter optional notes'. Below the notes field is a button labeled 'add optional photo', which is highlighted with a red rectangular border. At the bottom are two buttons: a green 'submit' button and a grey 'cancel' button.

If submitting a Checkpoint photo, your mobile phone camera will open up for you to take a picture.



When you are done filling in information for your Checkpoint you can submit.

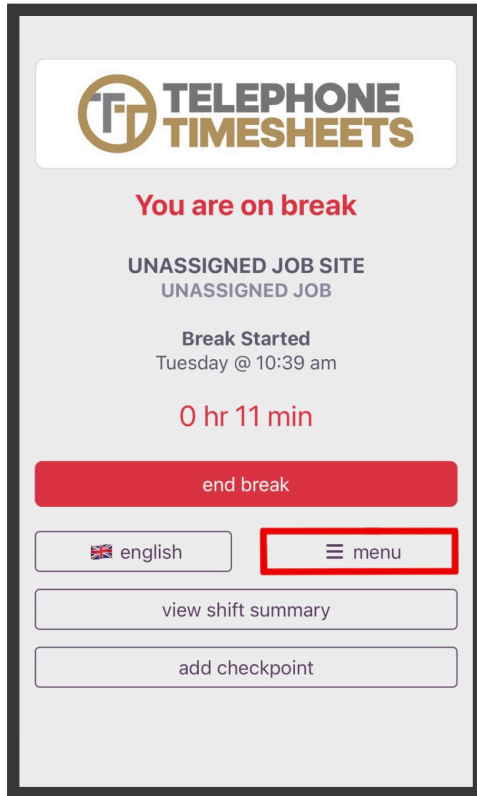
* Any submitted checkpoint will be visible to admin and supervisors



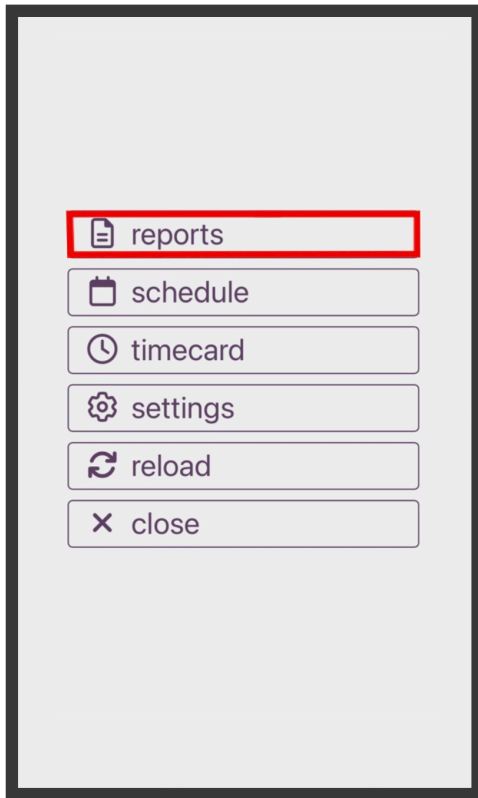
The screenshot shows the 'add checkpoint' screen of the Telephone Timesheets mobile app. At the top is the app's logo, which consists of a stylized 'TT' inside a circle followed by the text 'TELEPHONE TIMESHEETS'. Below the logo is a dashed rectangular box containing the text 'add checkpoint'. Underneath this is a text input field with the placeholder text 'enter optional notes'. Below the input field are three buttons: 'add optional photo', 'submit', and 'cancel'. The 'submit' button is highlighted with a red rectangular border.

9.2.3. Submitting In-Shift Reports

Employees can submit reports during their shift by clicking **Menu** in the employee web app.



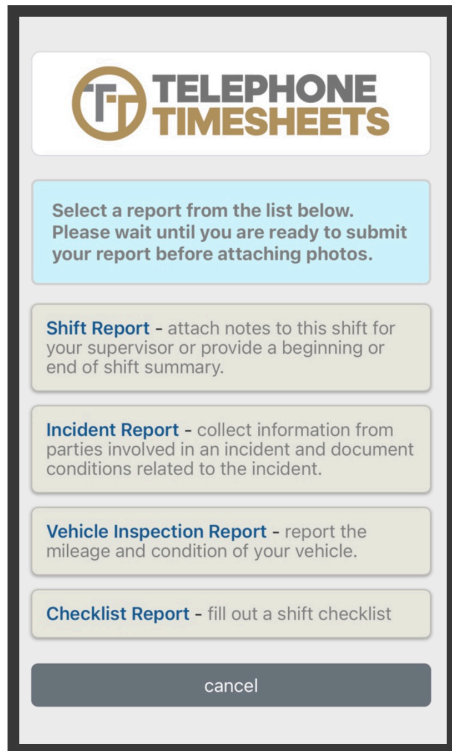
This will bring up a list of actions, you will want to click on **Reports**.



This will bring up the report selector where employees can choose from several built-in report types, as well as a customizable checklist report.

These are the supported report types:

- **Shift Report**: Generic report with notes and photos.
- **Incident Report**: Form-based report designed for security guards.
- **Vehicle Inspection Report**: Form-based report designed for employees who drive a company vehicle during their shift.
- **Checklist Report**: A customizable report made up of checklist items configured by an admin. This report can be targeted to specific employees and/or jobs. See the [Checklist Reports](#) section of the manual for more details.

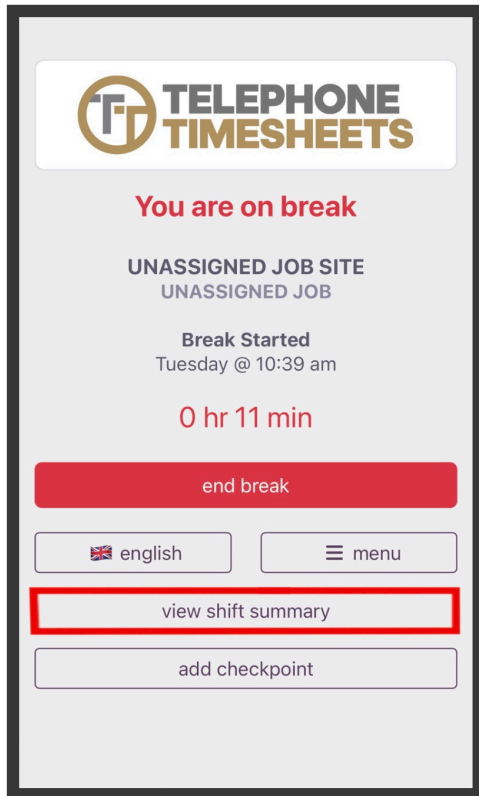


The screenshot shows a mobile application interface for 'TELEPHONE TIMESHEETS'. At the top is the logo, which consists of a stylized 'T' and 'P' inside a circle, followed by the text 'TELEPHONE TIMESHEETS'. Below the logo is a light blue instruction box that reads: 'Select a report from the list below. Please wait until you are ready to submit your report before attaching photos.' Underneath this are four report options, each in a light green box with a blue header: 'Shift Report' (attach notes to this shift for your supervisor or provide a beginning or end of shift summary), 'Incident Report' (collect information from parties involved in an incident and document conditions related to the incident), 'Vehicle Inspection Report' (report the mileage and condition of your vehicle), and 'Checklist Report' (fill out a shift checklist). At the bottom is a dark grey button labeled 'cancel'.

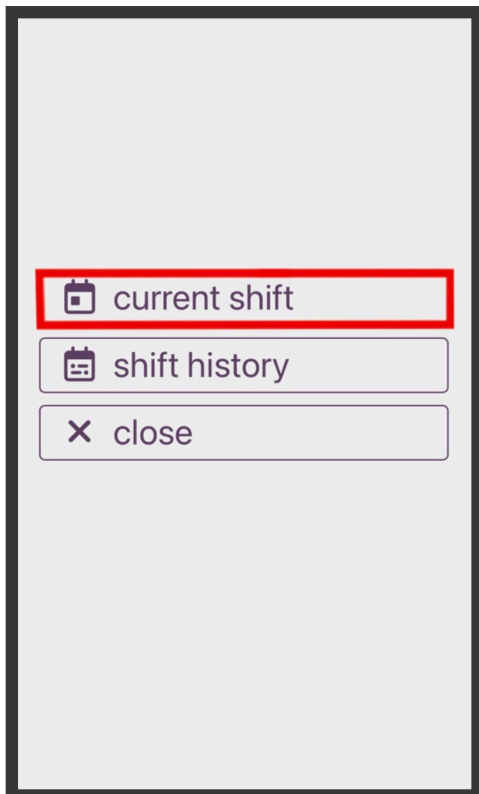
Any reports that you submit will be attached to your time entry. Any submitted reports can be viewed and edited by admin.

9.2.4. Viewing Hours Worked

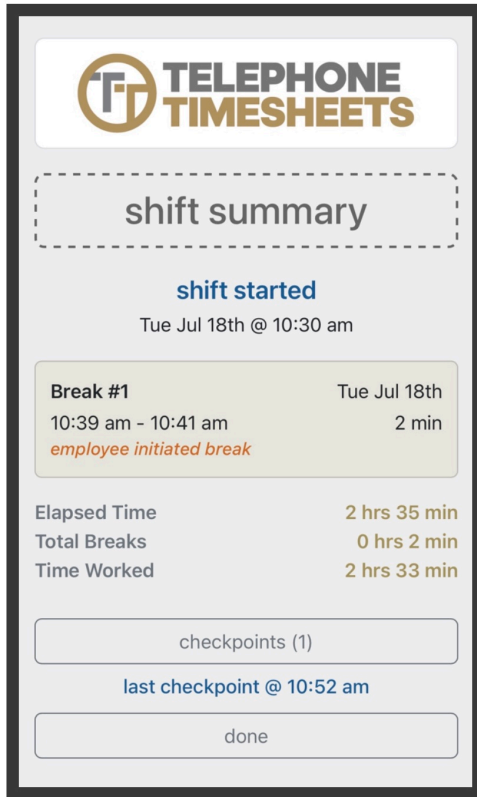
You can view your current shift details and your shift history by clicking **view shift summary**



To view your current shift summary click **Current Shift**.



When viewing your current shift details, you can view what job you are currently clocked into, how many breaks you've had and how long they were, how long you've worked, etc.



The screenshot shows a mobile application interface for 'shift summary'. At the top is the 'TELEPHONE TIMESHEETS' logo. Below it, the title 'shift summary' is enclosed in a dashed border. The main content area shows 'shift started' in blue text, followed by 'Tue Jul 18th @ 10:30 am'. A section for 'Break #1' on 'Tue Jul 18th' shows a duration of '10:39 am - 10:41 am' and '2 min', with a note 'employee initiated break' in orange. Below this, a summary table lists 'Elapsed Time' as '2 hrs 35 min', 'Total Breaks' as '0 hrs 2 min', and 'Time Worked' as '2 hrs 33 min'. At the bottom, there are buttons for 'checkpoints (1)', 'last checkpoint @ 10:52 am', and 'done'.

**TELEPHONE
TIMESHEETS**

shift summary

shift started
Tue Jul 18th @ 10:30 am

Break #1 Tue Jul 18th
10:39 am - 10:41 am 2 min
employee initiated break

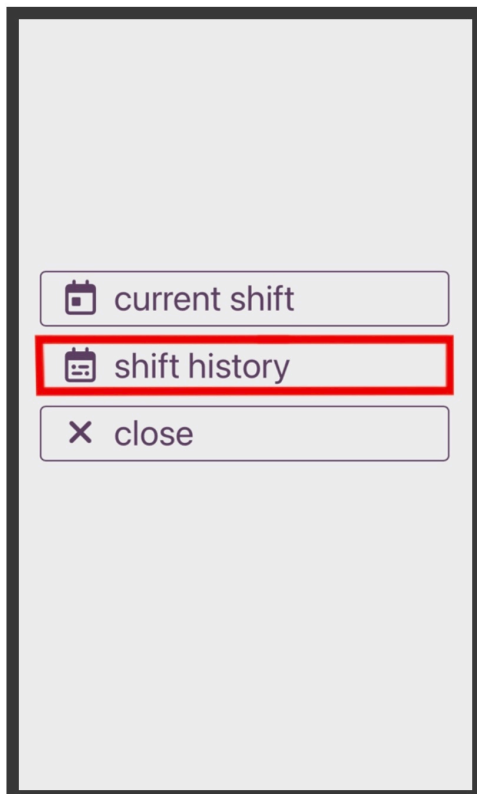
Elapsed Time 2 hrs 35 min
Total Breaks 0 hrs 2 min
Time Worked 2 hrs 33 min

checkpoints (1)

last checkpoint @ 10:52 am

done

To view your previous shift history click **Shift History**.



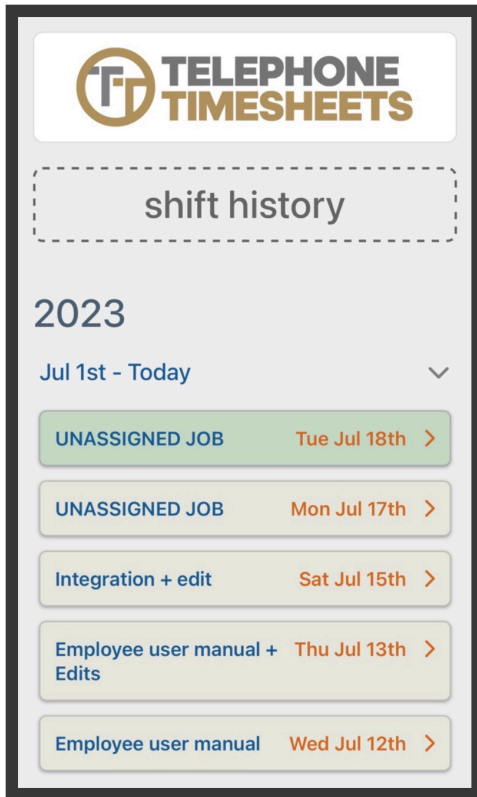
The screenshot shows a mobile application interface with a menu. It contains three items: 'current shift' with a calendar icon, 'shift history' with a calendar icon and a red border, and 'close' with an 'X' icon.

current shift

shift history

close

When viewing your shift history, you can see an overall view of what jobs you've worked. You are able to select a shift to view more specific details.



9.3. Enable Location Sharing

By default, location sharing is enabled on every mobile phone. If you have disabled it, or have blocked it, you can re-enable it by following the instructions below.

Click [here](#) for details on Apple Location Sharing

Click [here](#) for details on Android Location Sharing

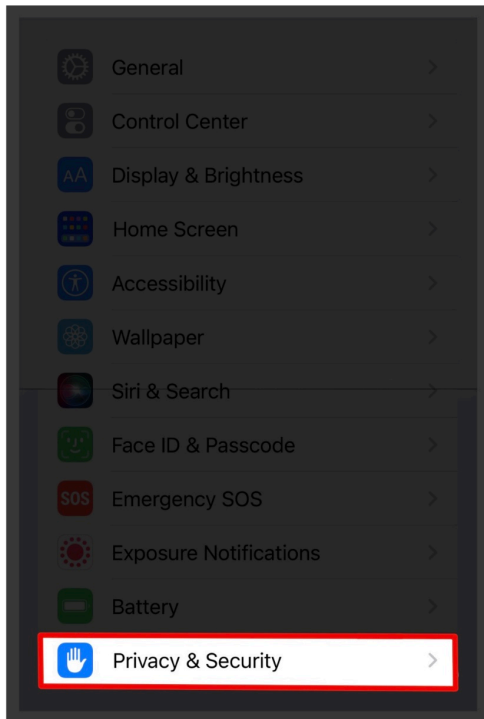
9.3.1. Details On Apple iOS Location Services

Enabling iOS Location Services

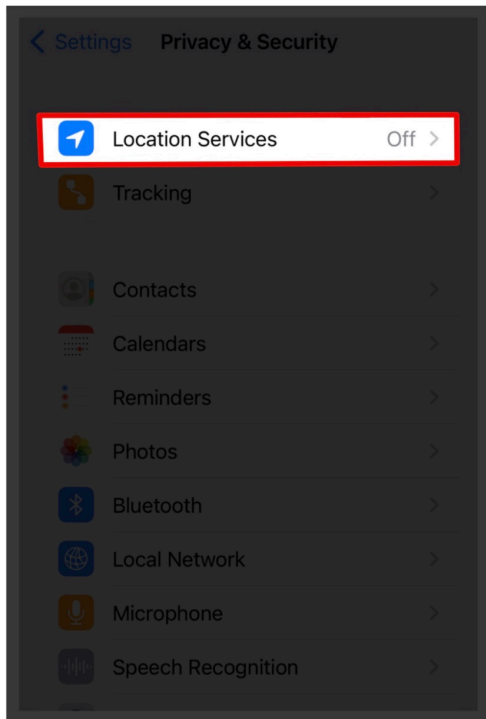
1. Go to Settings



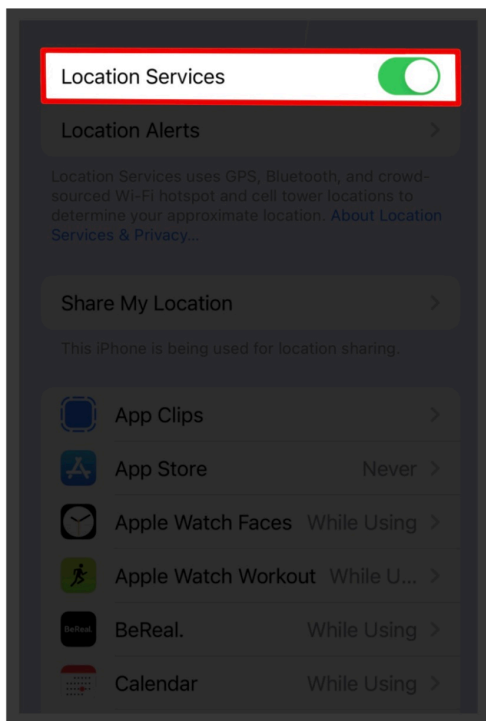
2. Scroll down and select Privacy & Security



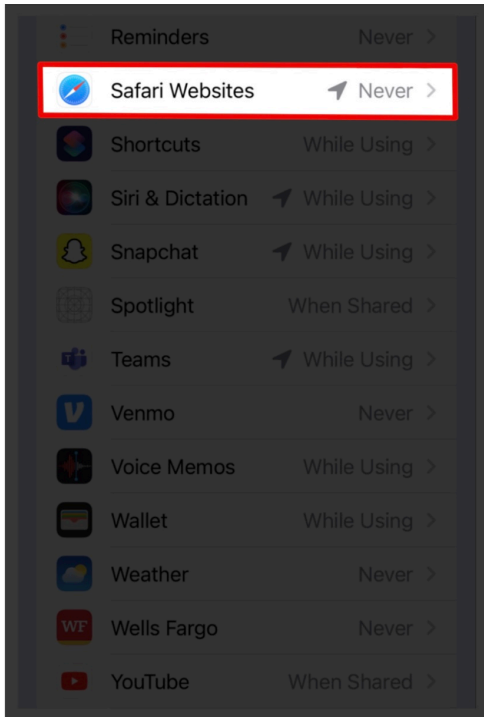
3. Click on Location Services



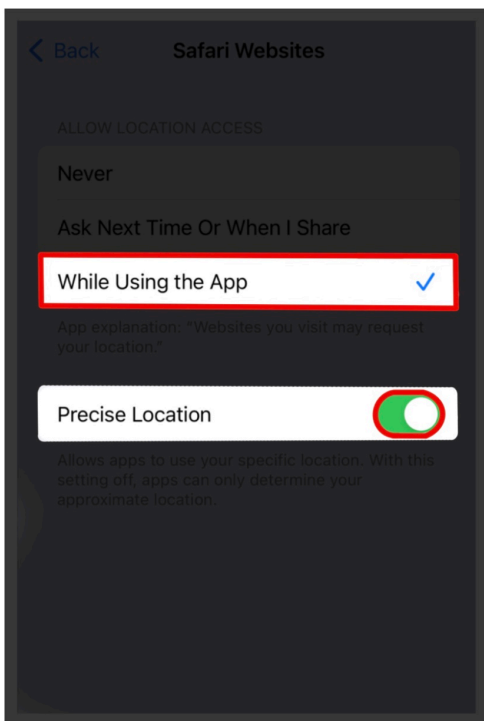
4. Make sure that Location Services is turned on



5. Scroll down and select Safari Websites



6. Select “While Using the App” and turn on Precise Location



9.3.2. Details On Android Location Services

Enabling Android Location Services

Android 10 & 11

Swipe down from the top of the screen.

Touch and hold Location. If you don't see Location tap Edit (Pencil icon) or Settings (Cogwheel). Drag Location into your Quick Settings.

To turn your phone's location accuracy on:

Swipe down from the top of the screen.

Touch and hold Location.

Tap Advanced Google > Location Accuracy.

Turn Improve Location Accuracy on or off.

Android 9.0

Open your device's Settings app.

Tap Security & Location > Location.

- If you have a work profile, tap Advanced.

Then, choose an option:

- Turn Location on or off: Tap Location.

- Scan for nearby networks: Tap Advanced Scanning. Turn Wi-Fi scanning or Bluetooth scanning on or off.

- Turn emergency location service on or off: Tap Advanced Google Emergency Location Service. Turn Emergency Location Service on or off.

Android 4.4 to 8.1

Open your phone's Settings app.

Tap Security & Location Location. If you don't see "Security & Location," tap Location.

Tap Mode. Then pick:

High accuracy: Use GPS, Wi-Fi, mobile networks, and sensors to get the most accurate location. Use Google Location Services to help estimate your phone's location faster and more accurately.

Battery saving: Use sources that use less battery, like Wi-Fi and mobile networks. Use Google Location Services to help estimate your phone's location faster and more accurately.

Device only: Use only GPS. Don't use Google Location Services to provide location information. This can estimate your phone's location more slowly and use more battery.

Android 4.1 to 4.3

Open your phone's Settings app.

Under "Personal," tap Location access.

At the top of the screen, turn Access to my location on or off.

When location access is on, pick either or both of:

- GPS satellites: Lets your phone estimate its location from satellite signals, like a GPS device in a car.

- Wi-Fi & mobile network location: Lets your phone use Google Location Services to help estimate its location faster, with or without GPS.

When location access is off: Your phone can't find its precise location or share it with any apps.

Need more help? More information on location services for Android devices can be found here:

<https://support.google.com/android/answer/3467281?hl=en>

10. Getting Support

If you need anything beyond what we've covered in this user manual, please don't hesitate to reach out to us via email, or phone. Click [here](#) to contact us.

11. Privacy Policy

TELEPHONE TIMESHEETS PRIVACY POLICY

Last Modified: June 19, 2023

1. Introduction

Telephone Timesheets is dedicated to protecting your personal information and informing you about how we use your personal information. Telephone Timesheets is the owner and operator of the Platform and collects information from you (“you”, “your”, or “user”) a user of the Platform. This Privacy Policy should be read in conjunction with the User Terms and the Additional Terms and is integrated into those agreements. All capitalized proper nouns not defined in this Privacy Policy will have the same definitions and meanings as defined by the User Terms and the Additional Terms. Please review this Privacy Policy periodically as we may revise it from time to time. If you do not agree with or accept our Privacy Policy in its entirety, you must not access or use the Platform. If you use the Platform following a change to the terms of this Privacy Policy you agree to accept the revised policies.

2. Information Collected

At Telephone Timesheets, we collect personally identifiable information (“PII”) and non-personally identifiable (“Non-PII”) information from you. Personally identifiable information is information that can be used to identify you personally. Non-personally identifiable information is information that must be combined with other information to identify you personally.

PII Collected

When you interact with our Platform we may collect your: name, email, address, billing information, account sign up, business information, Authorized User information, and other personal information. Where we accept electronic payment, please be aware that all payment information shall be collected, stored, and processed by our third party payment processors.

Non-PII Collected

Whenever you use our Platform, we may collect Non-PII from you, including but not limited to your IP address, zip code, browsing history, search history, and registration history, interactions with the Platform, usage information, location, referring URL, browser, operating system, data usage, data transferred, and Internet service provider.

3. Use of Your Information

Some of your information will be visible to other users of the Platform to facilitate communication. We will never sell your information without your permission; however you agree that we may use your information in the following ways:

- To provide any services offered and to operate the Telephone Timesheets Platform and to share with other users of the Platform.
- To enhance or improve our users’ experiences.
- To contact you via email or other electronic communications when you have an inquiry or to update you about products and services offered by our Platform or our partners.
- To notify you of additional Telephone Timesheets services and updates.
- To process your transactions.
- To share your information with third party partners or third parties hired by us to perform functions and provide services to us subject to the obligations consistent with this Privacy Policy.

4. Anonymized Data

Please be aware that we may collect and aggregate personally identifiable information from our Platform and may anonymize that information for our own research or internal purposes. Once such data has been anonymized, it cannot be traced back to you, the user.

5. Accessing and Editing Your Information

If you have any additional questions or wish to review, change, or access any of your information collected by us, please contact us at support@telephonetimesheets.com. After you have cancelled your account your PII may become immediately inaccessible. Please be aware that we may keep inaccessible copies of your PII and non-PII subject to our data retention policies which are subject to change without notice.

6. Cookies and Tracking

We use cookies for to remember you and to understand how you use the Platform. Additionally, some third party cookies integrated into our Platform may track your usage information and interactions with the Platform. If you disable cookies from your web browser some portions of our Platform may not work as expected.

7. Third Party Access to Your Information

Although you are entering into an agreement with Telephone Timesheets to disclose your information to us, we do use third party individuals and organizations to assist us, including contractors, web hosts, and others to allow you to access the Platform. Specifically, we share information with third parties to assist us in running the Platform and operations. Further, we share information with third parties to assist in marketing, analytics, advertising, interacting with us, and sending you notifications.

Throughout the course of our provision of our services to you, we may delegate our authority to collect, access, use, and disseminate your information. It is therefore necessary that you grant the third parties we may use in the course of our business the same rights that you afford us under this Privacy Policy. For this reason, you hereby agree that for every authorization which you grant to us in this Privacy Policy, you also grant to any third party that we may hire, contract, or otherwise retain the services of for the purpose of operating, maintaining, repairing, or otherwise improving or preserving our Platform or its underlying files or systems. You agree not to hold us liable for the actions of any of these third parties, even if we would normally be held vicariously liable for their actions, and that you must take legal action against them directly should they commit any tort or other actionable wrong against you.

8. Law Enforcement

You agree that we may disclose your information to authorities if compelled to by a court order. Additionally, you agree that we may disclose your information if we reasonably believe that you have violated US laws, the terms of our Terms of Service or our Privacy Policy, or if we believe that a third party is at risk of bodily or economic harm. In the event that we receive a subpoena affecting your privacy, we may elect to notify you to give you an opportunity to file a motion to quash the subpoena, or we may attempt to quash it ourselves, but we are not obligated to do either. We may also proactively report you and release your information without receiving any request to third parties where we believe that it is proper to do so for legal reasons, where your actions violate any law of the United States or any other country having jurisdiction over us, our Platform, or our Terms of Service. You release us from any damages that may arise from or relate to the release of your information to a request from law enforcement agencies or private litigants. We may release your information under the conditions listed in this paragraph whether it is to individuals or

entities and to any state or federal authorities, as required.

9. Opt Out of Commercial, Non-Commercial Communications and Do Not Track

If you decide to provide us with your contact information, you agree that we may send you communications via text, automated calls, and emails. However, you may unsubscribe from certain communications by notifying Telephone Timesheets that you no longer wish to receive these communications, we will endeavour to promptly remove you from our list once we have received that request. Some Internet browsers may be configured to send “Do Not Track” signals to the online services that you visit. We currently do not respond to “Do Not Track” or similar signals. To find out more about “Do Not Track,” please visit <http://www.allaboutdnt.com>.

10. Third Parties

Telephone Timesheets or other users may post links to or embed third party websites on the Platform, which may include information that we have no control over. When accessing a third party website or embedded content through our Platform, you acknowledge that you are aware that these third party websites are not screened for privacy or security issues by us, and you release us from any liability for the conduct of these third party websites.

Please be aware that this Privacy Policy, and any other policies in place, in addition to any amendments, does not create rights enforceable by third parties. Telephone Timesheets bears no responsibility for the information collected or used by any advertiser or third party websites. You must review their policies to understand how their information collection practices work.

11. Security Measures

We make reasonable attempts to protect your information by using physical and electronic safeguards. However, as this is the Internet, we can make no guarantees as to the security or privacy of your information. For this reason, we recommend that you use anti-virus software, perform routine credit checks, enable firewalls, and take other precautions to protect yourself from security and privacy threats.

12. Your California Privacy Rights

Telephone Timesheets permits residents of the State of California to use its Platform, and complies with the California Business and Professions Code §§ 22575-22579. If you are a California resident you may request certain information regarding our disclosure of personal information to any third parties for their direct marketing purposes. Various provisions throughout this Privacy Policy address requirements of the Californian privacy statutes. Although we do not disseminate your information to third parties without permission, you must presume that we collect electronic information from all visitors. You may contact us at support@telephonetimesheets.com with any questions.

13. Age Compliance

We do not knowingly collect or process any information for any persons under the age of 13. Users must be over the age of 13 to submit any information through the Platform, if you are under 13 and using our Platform, please do not submit any information to us. In the event that we have inadvertently collected any information from users under the age of 13 please contact us immediately.

14. International Transfer

Your information may be transferred to – and maintained on – computers located outside of your state,

province, country, or other governmental jurisdiction where the privacy laws may not be as protective as those in your jurisdiction. Your consent to this Privacy Policy followed by your submission of such information represents your agreement to that transfer. PII and Non-PII submitted to Telephone Timesheets will be collected, processed, stored, disclosed, and disposed of in accordance with applicable U.S. law and this policy. If you are a non-U.S. member, you acknowledge and agree that Telephone Timesheets may collect and use your Information and disclose it to other entities outside your resident jurisdiction. In addition, such information may be stored on servers located outside your resident jurisdiction. U.S. law may not provide the degree of protection for information that is available in other countries.

15. Merger and Acquisition

In the event that Telephone Timesheets is involved in a bankruptcy, merger, acquisition, reorganization or sale of assets, your information may be sold or transferred as part of that transaction. Please be aware that once the information is transferred your privacy rights may change.

Opt In Examples

Opt in examples



New Report

Report Owner

Any Supervisor



Report Options

- ☐ Enable pagination 
- ☐ Include suspect time entries 
- ☐ Include employee pay rate info
- ☐ Include vendor pay rate info
- ☐ Include client bill rate info
- ☒ Send text when report runs
- ☐ Send email when report runs

Filter Options

- ☐ Employee Supervisors
- ☐ Job Site Supervisors
- ☐ Employees
- ☐ Jobs

6:12



Timeclock

employee login



☐ By checking this box, I agree to receive text messages from Telephone Timesheets.

login

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