

SuiteCRM Simple Timesheet addon v1.00

Download and Purchase

Simple Timesheet addon is available for purchase and download from the following URL:
<https://store.suitecrm.com/addons/simple-timesheet>

Simple Timesheet installation and configuration

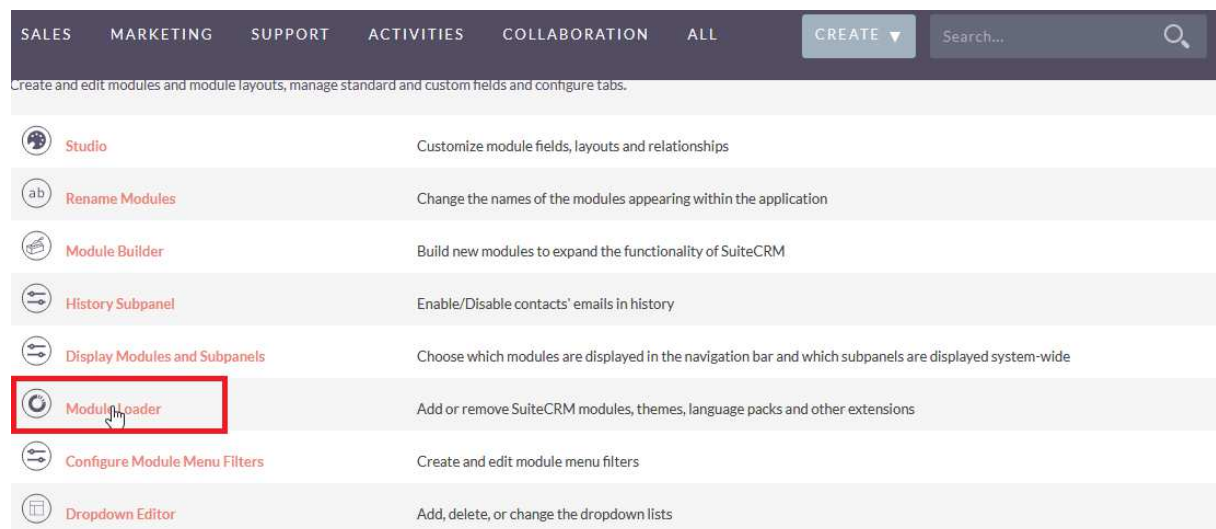
SimpleTimesheet addon is upgrade safe and supports all major versions of SuiteCRM 7+ as well as all editions of SugarCRM- CE.

The Installation process is quick and easy. It requires execution of view steps described below. Before proceeding with installation please make sure that the following two essentials that Simple Timesheet requires are met:

- You are running PHP 5.3 or greater
- cURL is enabled

1. Step 1 – upload SimpleTimesheet package and install it

Download Simple Timesheet addon zip file and collect your License Key. Log in to SuiteCRM as Administrator and navigate to Module Loader located in Admin Panel.



Upload Simple Timesheet addon zip file and hit Install button to install it. It will take a couple minutes to complete.

MODULE LOADER

The following extensions are installed on this system:

Name	Action	Enable/Disable	Type	Version	Date Installed
<					

Module

Browse... No file selected.

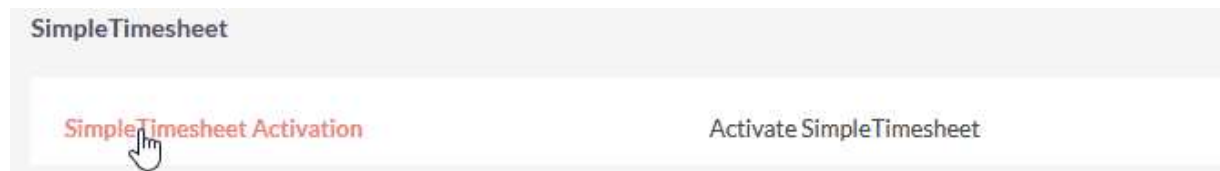
UPLOAD

Name	Install	Delete	Type	Version	Date Published	Uninst
SuiteCRM SimpleTimesheet	INSTALL	DELETE PACKAGE	Module	1.0.0	2017-10-01	Yes
<						

Follow the installation steps and make sure installation has completed without any errors.

2. Step 2 – Simple Timesheet activation

On Step 2 you will validate your Simple Timesheet license through SugarOutfitters. From SuiteCRM Admin Panel hit **Simple Timesheet Activation** link.



Enter your Simple Timesheet Licence Key and hit **Activate**.



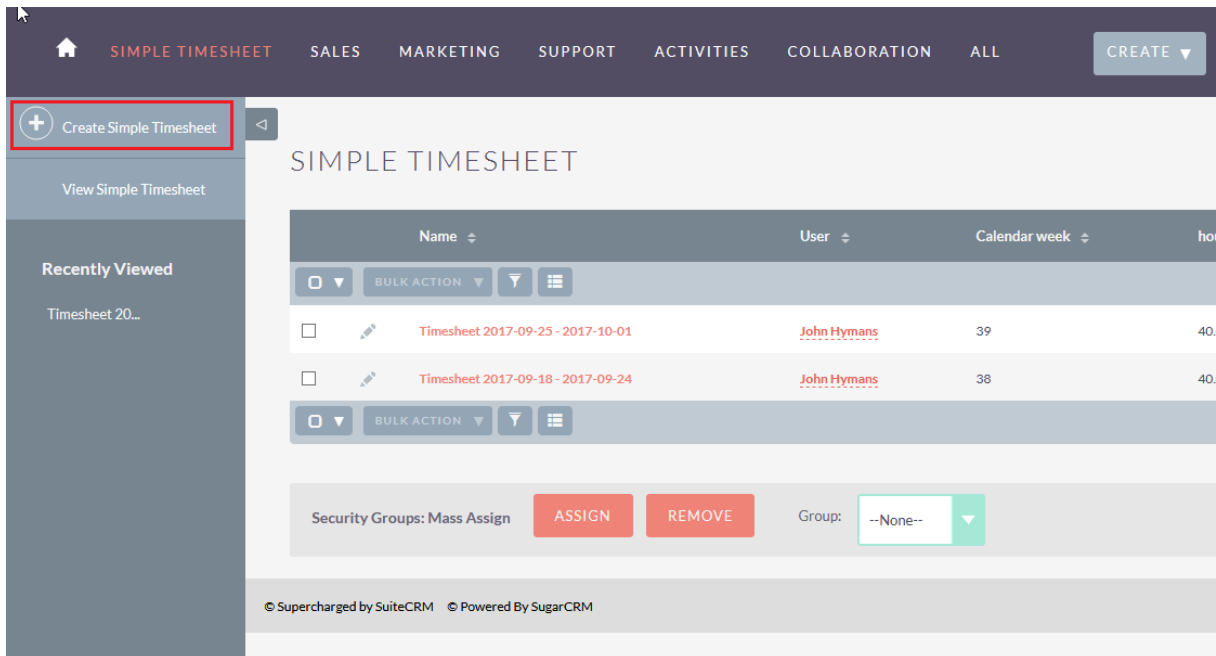
If you attempt to validate an inappropriate key, Simple-Timesheet will inform you that the Validation was unsuccessful. Once the License Key is successfully validated, you can start using add-on.

User Guide

Reporting time spent on Projects->Project tasks.

Before starting using Simple Timesheet make sure there are Projects and project tasks defined in the system so that Users can report hours on project tasks.

From Main Menu expand **ALL** and hit **Simple Timesheet**. Click **Create Simple Timesheet** from module menu on the left.






The screenshot displays the 'SIMPLE TIMESHEET' application interface. The top navigation bar includes 'SIMPLE TIMESHEET', 'SALES', 'MARKETING', 'SUPPORT', 'ACTIVITIES', 'COLLABORATION', 'ALL', and a 'CREATE' button. A sidebar on the left contains a 'Create Simple Timesheet' button (highlighted with a red box), 'View Simple Timesheet', and a 'Recently Viewed' section. The main content area shows a table of timesheet entries with columns for Name, User, and Calendar week. Two entries are visible, both assigned to 'John Hymans'. Below the table are 'ASSIGN' and 'REMOVE' buttons, and a 'Group' dropdown menu set to '--None--'.

Name	User	Calendar week	hours
Timesheet 2017-09-25 - 2017-10-01	John Hymans	39	40
Timesheet 2017-09-18 - 2017-09-24	John Hymans	38	40




Timesheet entry view allows entering time values for particular **Project->project tasks** and **dates** corresponding to relevant **calendar weeks**.

Record Time Spent on Projects Gemini-64 UX Prototupe

Period from **02.10.2017** To **08.10.2017** Employee: **John Hymans (John)** Week: **40.2017**    **SAVE** **CLOSE**

Week 40	MO 02/10	TU 03/10	WE 04/10	TH 05/10	FR 06/10	SA 07/10	SU 08/10	Total
Gemini-64 UX Prototupe --> Assemble product	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Gemini-64 UX Prototupe --> Create communication plan	2.00	4.00	0.00	0.00	0.00	0.00	0.00	6
Gemini-64 UX Prototupe --> Develop Acceptance Test plan	2.00	4.00	0.00	0.00	0.00	0.00	0.00	6
Gemini-64 UX Prototupe --> Meet with bankers	2.00	0.00	0.00	0.00	0.00	0.00	0.00	2
Gemini-64 UX Prototupe --> Prepare Project Plan	2.00	0.00	0.00	0.00	0.00	0.00	0.00	2
Gemini-64 UX Prototupe --> Quality testing	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Gemini-64 UX Prototupe --> Setup assembly line	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Gemini-64 UX Prototupe --> Train Customers	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Gemini-64 UX Prototupe --> Write functional specifications	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
	8	8	0	0	0	0	0	16

Use Project dropdown in the upper right corner to filter the list and display only the tasks of the project you are interested.









Use arrow icons   to move to the previous or next calendar week or enter the week number and year and hit refresh icon  to go to the specific calendar week if needed.

Reporting time is very intuitive with matrix interface. In order to report time on particular project task, enter number of spent hours in the corresponding text fields under the relevant dates. You can control day totals below each day column and project tasks totals on the right of each task row. Entire week total calculates in the corner of the list.

Hit **Save** when you have finished entering time values. This will create/update timesheet in the system. Click **Close** if you want to jump to the timesheets list.

Please note that typical user can manage (create/list/view/edit/delete) only his own timesheets. Administrator has full rights to every timesheet in the system including his own and other user's timesheets.

SIMPLE TIMESHEET

Name	User	Calendar week	hours	Date from	Date to
<input type="checkbox"/>  Timesheet 2017-09-25 - 2017-10-01	John Hymans	39	40.00	09/25/2017	10/01/2017
<input type="checkbox"/>  Timesheet 2017-09-18 - 2017-09-24	John Hymans	38	40.00	09/18/2017	09/24/2017
<input type="checkbox"/>  Timesheet 2017-09-25 - 2017-10-01	Vicky Smith	39	56.00	09/25/2017	10/01/2017
<input type="checkbox"/>  Timesheet 2017-09-04 - 2017-09-10	Martin Brauer	36	56.00	09/04/2017	09/10/2017
<input type="checkbox"/>  Timesheet 2017-09-11 - 2017-09-17	Martin Brauer	37	56.00	09/11/2017	09/17/2017
<input type="checkbox"/>  Timesheet 2017-09-25 - 2017-10-01	Martin Brauer	39	24.00	09/25/2017	10/01/2017
<input type="checkbox"/>  Timesheet 2017-09-18 - 2017-09-24	Martin Brauer	38	16.00	09/18/2017	09/24/2017
<input type="checkbox"/>  Timesheet 2017-09-18 - 2017-09-24	Vicky Smith	38	40.00	09/18/2017	09/24/2017

You can filter the list by using search facility with the following criteria: user, calendar week, hours (time spent), timesheet date from and date to.

Viewing timesheet details and generating timesheet PDF.

Timesheet link on the list, redirects to the timesheet detail view page, where you can get all the details of particular record.

TIMESHEET 2017-09-25 - 2017-10-01 ☆

BASIC ACTIONS ▾ PREVIOUS (1 of 8) NEXT >

Name: Timesheet 2017-09-25 - 2017-10-01 hours: 40,00

Date from: 09/25/2017 Date to: 10/01/2017

Calendar week: 39 User: John Hymans

TIMESHEET ENTRY

Projects ▾	Task	Report date ▾	Hours ▾
Gemini-64 UX Prototupe	Prepare Project Plan	09/25/2017	8.00
Gemini-64 UX Prototupe	Prepare Project Plan	09/26/2017	8.00
Gemini-64 UX Prototupe	Meet with bankers	09/27/2017	4.00
Gemini-64 UX Prototupe	Develop Acceptance Test plan	09/27/2017	4.00
Manhattan Project	Design prototype	09/28/2017	4.00
Manhattan Project	Create SOW	09/28/2017	4.00
Manhattan Project	Project kick-off meeting	09/29/2017	8.00

The Timesheet Entry subpanel shows all the timesheet entries reported by user.

From within this view expand **Actions** menu and

- hit **Edit** to jump to the Timesheet Entry edit page to update timesheet
- hit **Print as PDF** to generate a PDF document, ready for printing or e-mail sending



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TIMESHEET

Period	User
Timesheet 2017-09-25 - 2017-10-01	John Hymans
Date From	Date to
09/25/2017	10/01/2017
Total effort (hours)	Calendar week
40	39

Project	Task	Report Date	Hours
Gemini-64 UX Prototupe	Prepare Project Plan	09/25/2017	8
Gemini-64 UX Prototupe	Prepare Project Plan	09/26/2017	8
Gemini-64 UX Prototupe	Meet with bankers	09/27/2017	4
Gemini-64 UX Prototupe	Develop Acceptance Test plan	09/27/2017	4
Manhattan Project	Design prototype	09/28/2017	4
Manhattan Project	Create SOW	09/28/2017	4
Manhattan Project	Project kick-off meeting	09/29/2017	8
Total			40

Simple Timesheet comes with predefined PDF template for timesheets. You may want to change it e.g change the logo or fonts etc... Please navigate to **ALL->PDF templates** and choose Viznet SimpleTimesheet template and then hit **Edit** to make desired changes.

Including timesheet with invoice

Timesheets can be easily added into invoice. When editing invoice, move to the **Line Items** part and hit **Add Timesheet** button.

LINE ITEMS

Currency: US Dollars : \$

Line Items:

ADD GROUP ADD TIMESHEET

Next, select the timesheet you want to include and the **Line Items** will be automatically populated with timesheet data, including dates and project tasks, quantities (corresponding to spent time) and prices (corresponding to user hourly rate). You can add many timesheets into one invoice. Please note that user **Hourly rate** should be configured in the User profile.

Line Items:

Group Name: Timesheet 2017-09-25 - 2017-10-01 for John Hymans

Service	Qty	List	Discount		Sale Price	Tax Amount		Total
2017-09-25 Gemini-64 UX Prototupe --> Prepare Project Plan	8	27.00		Pct	27.00	0.00	0%	216.00
2017-09-26 Gemini-64 UX Prototupe --> Prepare Project Plan	8	27.00		Pct	27.00	0.00	0%	216.00
2017-09-27 Gemini-64 UX Prototupe --> Meet with bankers	4	27.00		Pct	27.00	0.00	0%	108.00
2017-09-27 Gemini-64 UX Prototupe --> Develop Acceptance Test	4	27.00		Pct	27.00	0.00	0%	108.00
2017-09-28 Manhattan Project --> Design prototype	4	27.00		Pct	27.00	0.00	0%	108.00
2017-09-28 Manhattan Project --> Create SOW	4	27.00		Pct	27.00	0.00	0%	108.00
2017-09-29 Manhattan Project --> Project kick-off meeting	8	27.00		Pct	27.00	0.00	0%	216.00

When finished, hit **Save** and Invoice will be created / updated.

INVOICE 09123432 ☆

OVERVIEW Invoice To Line Items OTHER ACTIONS ▾

Currency: US Dollars

Line Items:

Group Name:		Timesheet 2017-09-25 - 2017-10-01 for John Hymans						
Qty	Service	List	Discount	Sale Price	Tax	Tax Amount	Total	
1	8	2017-09-25 Gemini-64 UX Prototype --> Prepare Project Plan	\$27.00	-	\$27.00	0%	\$0.00	\$216.00
2	8	2017-09-26 Gemini-64 UX Prototype --> Prepare Project Plan	\$27.00	-	\$27.00	0%	\$0.00	\$216.00
3	4	2017-09-27 Gemini-64 UX Prototype --> Meet with bankers	\$27.00	-	\$27.00	0%	\$0.00	\$108.00
4	4	2017-09-27 Gemini-64 UX Prototype --> Develop Acceptance Test plan	\$27.00	-	\$27.00	0%	\$0.00	\$108.00
5	4	2017-09-28 Manhattan Project --> Design prototype	\$27.00	-	\$27.00	0%	\$0.00	\$108.00
6	4	2017-09-28 Manhattan Project --> Create SOW	\$27.00	-	\$27.00	0%	\$0.00	\$108.00
7	8	2017-09-29 Manhattan Project --> Project kick-off meeting	\$27.00	-	\$27.00	0%	\$0.00	\$216.00
							Total:	\$1,080.00
							Discount:	\$0.00
							Subtotal:	\$1,080.00
							Tax:	\$0.00
							Grand Total:	\$1,080.00

Total: 1,080.00

The **Line Items** part lists the details of invoice.
Simple Timesheet comes with predefined invoice PDF template. From Actions menu hit **Print as PDF** to generate invoice in PDF format.



SuiteCRM Ltd
Any Street
Any Town

INVOICE

Prepared For	Prepared By
Luckytronics 347-7666 Iaculis St. Woodruff SC 49854	Administrator
Invoice Date	Due Date
09/28/2017	09/30/2017
Invoice Number	
2	

Quantity	Product	Description	List	Discount	Sale Price	Tax	Total
8	2017-09-25 Gemini-64 UX	Prototupe --> Prepare Project Plan	27.00		27.00	0%	216.00
8	2017-09-26 Gemini-64 UX	Prototupe --> Prepare Project Plan	27.00		27.00	0%	216.00
4	2017-09-27 Gemini-64 UX	Prototupe --> Meet with bankers	27.00		27.00	0%	108.00
4	2017-09-27 Gemini-64 UX	Prototupe --> Develop Acceptance Test plan	27.00		27.00	0%	108.00
4	2017-09-28 Manhattan Project -	-> Design prototype	27.00		27.00	0%	108.00
4	2017-09-28 Manhattan Project -	-> Create SOW	27.00		27.00	0%	108.00
8	2017-09-29 Manhattan Project -	-> Project kick-off meeting	27.00		27.00	0%	216.00
Total							1,080.00
Discount							0.00
Subtotal							1,080.00
Tax							0.00
Shipping							0.00
Grand Total							1,080.00