

Because the Payroll Time Flag process spans two modules, it can be confusing for the Service Department to understand what happens once the information is compiled. This document explains the steps the Service Department needs to complete for the Payroll Time Flags and explains what happens in Payroll once the Service Department has completed its part. This document does not provide detailed instructions about the how to use the screens for the Payroll Time Flags. If you need information about using the screens, please press F1 while on a screen to read the help page for that screen.

Important: In order for the flag time to update to Accounting properly, you must have Accounting verify that *all technicians* are set up in the Service Time Flag Setup.

Managing Time Flags on a Daily Basis

The Flagged Time Report prints a real-time flag-time report. Every time you add time flag data to a repair order on the Close Service screen, whether you add to or subtract from the time, the system stores the information in the report database. The system calculates the technicians' actual time units every time you print the report. While it is not required, AutoSoft recommends you print this report at the end of every day and review it to ensure the time is correct. Managing your time flags daily minimizes the amount of editing required when you compile the time flags for the pay period.

This report includes all open repair orders and closed repair orders that have been updated to Accounting during the date range you specify. The report prints the information by technician. Use the list to identify any repairs that you may want to add time for on the current payroll. If the time is not correct, you will need to edit the time on the repair order on the Close Service screen.

1. Click **Service Writing** on the ASI DMS menu.
2. Click **Reports & Updates**.
3. Click **Service Time Summary Reports**.
4. Click **Flagged Time**.
5. The dates in the **From** and **To** fields default to the current system date. Leave the dates to print the report for the current day (or use the drop-down calendar to select different dates as needed).
6. Click **Go**.
7. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.
8. Once you select your print type, click **Print**.

Managing Time Flags for a Pay Period

If you have been managing your time flags daily, you will not need to do too much editing to prepare the time flags for payroll. The flagged time for the pay period should be correct. However, if you prefer to print the Flagged Time report for the pay period instead of daily, you will need to verify all time for the pay period and edit the time as needed. For open repair orders, edit the time on the Close Service screen. For closed repair orders, you will need to edit the compiled flag time data.

Important: All time that will be included for the pay period must be flagged (added to the repair on the Close Service screen) before the end of the pay period.

1. Click **Service Writing** on the ASI DMS menu.
2. Click **Reports & Updates**.
3. Click **Service Time Summary Reports**.
4. Click **Flagged Time**.
5. Use the drop-down calendar to select the dates for the pay period.
6. Click **Go**.
7. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.
8. Once you select your print type, click **Print**.

Tip: If you prefer to work from a list of the open repair orders, you can print the Work In Process Worksheet available on the Service Time Summary menu. This report will only list the open repair orders rather than listing the open and closed repair orders like the Flagged Time report.

Entering Pre-Flag Time

The Flagged Time report includes all open and closed repair orders. However, the Payroll Time Flags only include time for closed repair orders that have been updated to Accounting. Therefore, you must pre-edit the payroll time for open repair orders or closed repair orders that have not been updated to Accounting. The Status column on the Flagged Time report identifies if the repair order is open or closed.

1. Click **Reports & Updates** on the Service Writing main menu.
2. Click **Payroll Time Flags**.
3. Click **Enter Pre-Flag Time**. The Payroll Time Pre-Flags screen appears.
4. The right side of the screen displays the open repair orders. Click a repair order. The repair order number, customer's name, and vehicle make and model fill in the fields at the top of the screen.
5. Click the repair you want to select. Any previously paid flags on the repair fill in the **PPFU** field (Prior Pre-Flag Units).
6. The **CT** field displays the charged time units for the repair, and the **AT** field displays the actual time units for the repair.
7. Type the total units for the repair in **PFU**. If the repair order is open and flagged over more than one payroll, the payroll program will do the calculation. This is only when a repair order is open and flagged over more than one payroll.

For example, the first week the technician puts 2 hours on a job. The Service Manager enters 20 units as the pre-flag time, and the technician's pay includes the 20 units. By the end of the second week, the job is still not finished, and now the technician has a total of 5 hours on the job. The Service Manager will now enter 50 units, the total time on the job. When the payroll program compiles the flags, the technician will be paid for 30 units for this pay because he was paid for 20 of the 50 units last pay.

8. Click **Save**. Continue to work your way through the list of repair orders.
9. When you have edited all the repair orders, Click **Print** on the bottom of the Payroll Time Pre-Flags screen to print the pre-flag time you have entered. Use this report to verify the information is correct.
10. Click **Exit** to close the screen.

Compiling the Time Flag Data

Once you have entered the pre-flag time, you compile the time flag data. This compiles information for closed repair orders that have been updated to Accounting and any information added for open repair orders.

1. Click **Compile Time Flag Data**.
2. Click the **Refresh Data** button on the left side of the prompt, and click **Refresh** when prompted to verify you want to refresh the data. AutoSoft recommends that you refresh the data before compiling to ensure it is current.
3. When the refresh is complete, use the drop-down calendars to select the date range for the compiled data. This is the start and end date for the pay period.
4. Click **Go**.
5. Click **OK** when prompted to verify you want to compile the data.

Editing the Compiled Data

Next, you edit the compiled data as needed. This is your last chance to edit the time on the closed repair orders or to re-edit information on an open repair order before the data is pulled to Accounting.

1. Click **Edit Compiled Data**. The Edit Technician Time Flags screen appears.
2. The left side of the screen lists all the technicians set up in the Service Time Flags setup in Accounting.
3. If a technician is missing from this screen, have Accounting verify the technician is set up in the Service Time Flag setup.
4. When you are finished editing repair orders, click **Exit** to close the screen.

Editing the Cost on a Repair Order

1. Click the technician you want to select in the list window on the left side of the screen.
2. The window on the right side of the screen displays a list of repair orders pulled for the technician. Click a repair order to select it. (You can view a summary of the repair order by clicking **View R/O**.)
3. If the technician has been pre-paid, the **Labor Units** field displays the time units for the repair, and the **Labor Cost** field displays the cost for this repair order. Edit these amounts as needed.
4. Click **Save** to save the information.

Removing a Repair Order

Use the following instructions to remove a selected repair order from a technician's list.

1. Select the technician and repair order.
2. Click **Remove**.
3. Click **Gone** when prompted to verify you want to delete the record.

Adding a New File

You should use the Work In Process Worksheets to add new files on this screen.

1. Select the technician.
2. Type the repair order number, or click **Open R/O's** to select the R/O from a list of the open repair orders for the selected technician.
3. Click **OK** when prompted that the system will create a new record.
4. Type the time units in the **Labor Units** field, and the **Labor Cost** field automatically fills in with the appropriate cost based on the time units.
5. Click **Save**. The repair order is added to the list on the right side of the screen.

Removing the Compiled Data

Use the **Remove Compiled List** button on the Service Time Flags menu to remove all of the compiled information. **This deletes all flag the time data: pre-flag data, compiled data, and edited data.** If you decide you want to use the Service Time Flag data, you will have to start at the beginning and enter the pre-flag time, compile the time flag data, and edit the compiled data again.

1. Click **Remove Compiled List**.
2. Click **Gone** when prompted to verify you want to delete the information.

Viewing Previously Paid Time Flags

Use the **View Previously Paid Flags** button to view all of the previously compiled time flags that have been updated to payroll.

1. Click **View Previous Paid Flags**.
2. Click an R/O in the list to view the R/O on your screen.
3. Click **Back** to close the R/O or the View Previous Paid Flags screen.

Printing the Finalized Flag Data

The final step is to print the flag data. This printout lists all of the repair orders (compiled and edited) for each technician and the total labor cost. Use it to verify your information. Always print this information and review it one last time before ending the time flag process.

1. Click **Print Flag Data**.
2. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.
3. Once you select your print type, click **Print**.

At this stage, the process is complete in the Service Writing module. The information is available in the Accounting module. Using the Service Time Flags feature in Payroll, the information is pulled to the current payroll and posted.

Time Flags in Accounting

1. Click **Payroll**.
2. Click **Times/Commissions**.
3. Click **Process Service Time Flags**.
4. Click **Compile Flag Data**. If compiled time flag data exists, the system will display a warning. The warning will include the date the existing data was compiled. You must indicate if you want to use the existing compiled data or if you wish to compile new data.

If you click **Yes** to use the existing data, proceed to editing the data as needed.

If you click **No** to not use the existing data, any existing data will be overwritten when you compile the new data. **You will lose all the edits that the Service Department made.** If you override the data but need to use it, you will have to manually enter all the edited data again based on information provided by the Service Department.

5. You can click **Edit Compiled Data** to review the compiled data as needed, but it is not required if the Service Department has edited the time flag data. This is your last chance to review and edit the data before you update it to the payroll.
6. Click **Update Flag Time To Pay**.
7. Click **OK** when prompted to verify you want to update the data.
8. When the an operator opens the Enter Employee Pay screen to enter payroll and selects a technician, the system displays a message indicating pay data has been pulled for this employee. The operator must click **OK** to acknowledge the message.
9. The total service time pay and hours automatically fill in on the screen. Any additional pay can be added as needed.