

Changes to PlainSail's timekeeping system

Key goals

- Speed up the entry of time postings
- Simplify the input process and provide a clearer view of your day/ week
- Make it easier to copy previous timesheet entries and extend existing entries
- Complete your timesheet entries as they happen to avoid bulk posting

Considerations

- PlainSail will now need you to specify the time of the day that the time record occurred at.
- No other changes to billing have been made and these changes only affect the input of time entries.

New timesheet view

Viewing your timesheet

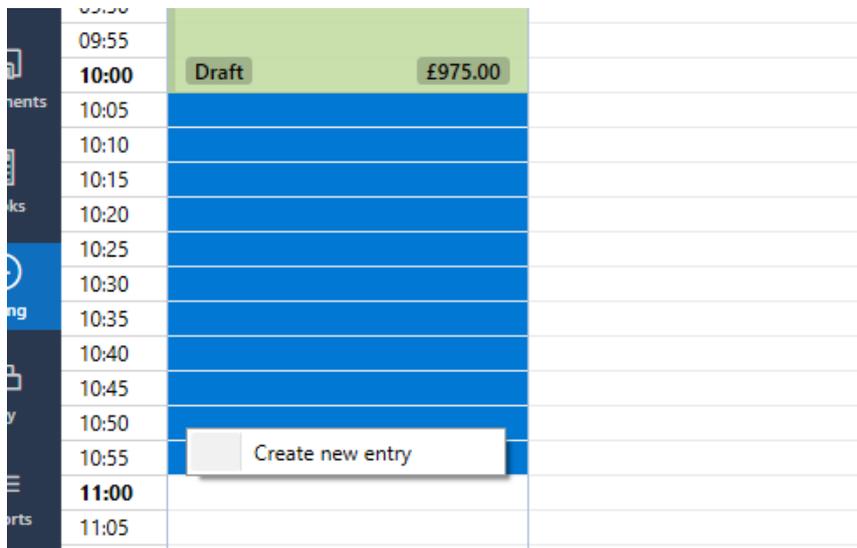
The timesheet view has now been changed to display a calendar layout with your working day split into your Company's minutes per unit. The new view has three separate views:

- **Day:** Displays one day at a time
- **Working week:** Displays Monday – Friday
- **Week:** Displays a full week including Saturday & Sunday

	Mon,10 Aug (35 units)	Tue,11 Aug (0 units)	Wed,12 Aug (0 units)	Thu,13 Aug (0 units)	Fri,14 Aug (21 units)
10:55					
11:00					
11:05					
11:10					
11:15	The Owing Company - Internal work Internal work				
11:20					
11:25					
11:30					
11:35					
11:40					
11:45					
11:50					
11:55					
12:00					
12:05					
12:10					
12:15	Draft Non-chargeable				
12:20	Beechwood Limited - Accounts Preparation Preparing 2019 Financial Statements				
12:25					
12:30					
12:35					
12:40					
12:45					
12:50					
12:55					
13:00	Draft £675.00				
13:05					
13:10					
13:15					
13:20					
13:25					

Entering new timesheet entries

To enter a new timesheet entry, highlight the units of the day and either right click and press **'Create new entry'** or use the keyboard shortcut combination **Ctrl+N**:



The standard time entry screen will be displayed and will default the start time and finish time based on the units selected:

The image shows a form titled 'Enter a new time record'. The form has the following fields and sections:

- Activity:** A dropdown menu with 'Accounts Preparation' selected.
- Client:** A search box with the text 'Search entities...' and a magnifying glass icon.
- Charged by:** A red error message: 'You must select an entity first.'
- Date:** A date picker showing '10/08/2020' and a calendar icon.
- Description:** A text input field.
- Start time:** A time range selector showing '10:05' and '11:00' with a right-pointing arrow.
- Units:** A text input field containing the number '11'.
- Duration:** A horizontal slider bar.
- Repeat entry:** A toggle switch.
- Amount:** A text field showing '0.00'.
- Time:** A text field showing '0 hours and 55 minutes'.
- Footer:** Two buttons: 'Undo' and 'Save'.
- Recent Activities:** A list with two items: 'Accounts Preparation' and 'Internal work', each with a left-pointing arrow.
- Recent Clients:** A list with two items: 'Beechwood Limited' and 'The Beechwood Trust', each with a left-pointing arrow.

Enter the details and click **'Save'**. You can click **'Repeat Entry'** if you wish to repeat the entry on following days e.g. for a holiday.

You can continue to enter time from the bottom status bar. The start time will default to the finish time of the latest entry you added.

Enter a new time record

Activity:

Client:

Charged by: You must select an entity first.

Date:

Description:

Start time: → 14:00

Units:

Duration:

Amount: 0.00 0 hours and 0 minutes

*5 minutes in a unit.

Recent Activities

- < Accounts Preparation
- < Internal work

Recent Clients

- < Beechwood Limited
- < The Beechwood Trust

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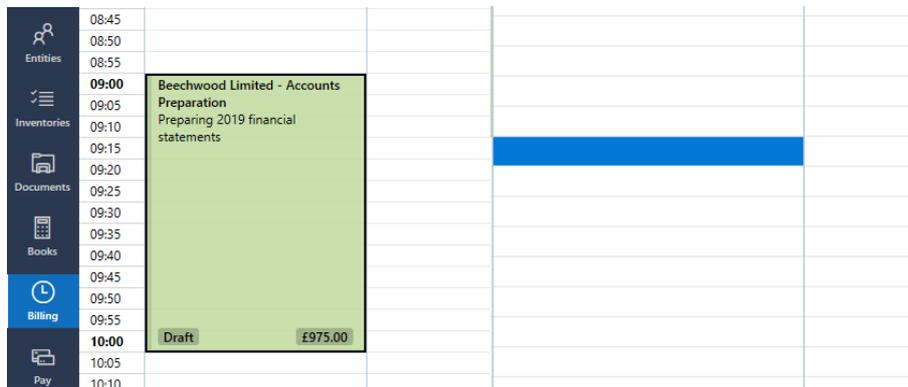
Editing/ deleting a time entry

Double click a time entry to edit it (you can only do this for draft entries). To delete it, right click and press delete or use the delete key on your keyboard.

<div style="display: flex; flex-direction: column; justify-content: space-between; padding: 5px;"> <div style="text-align: center;"> Entities</div> <div style="text-align: center;"> Inventories</div> <div style="text-align: center;"> Documents</div> <div style="text-align: center;"> Books</div> <div style="text-align: center;"> Billing</div> <div style="text-align: center;"> Pay</div> </div>	08:45		
	08:50		
	08:55		
	09:00		
	09:05		
	09:10		
	09:15		
	09:20		
	09:25		
	09:30		
	09:35		
	09:40		
	09:45		
	09:50		
09:55			
10:00	Draft	£975.00	
10:05			
10:10			

Copying a timesheet entry

Select the entry you wish to copy by clicking it, a black outer border will be displayed to show it is selected. Press **CTRL+C**. Click the cell you wish to paste it in and press **Ctrl+V**:



The screenshot shows a timesheet interface with a vertical sidebar on the left containing navigation icons for Entities, Inventories, Documents, Books, Billing, and Pay. The main area displays a grid of time slots from 08:45 to 10:10. A green popout window is overlaid on the 09:00-09:55 slot, containing the following text: "Beechwood Limited - Accounts", "Preparation", "Preparing 2019 financial statements", "Draft", and "£975.00". A blue horizontal bar highlights the 09:15-09:20 slot in the grid.

The Time entry screen will appear with the details of the entry you copied allowing you to change the client/ narrative. Press **Save**.

Shortcuts

1. **Ctrl+N** : Launches create a new entry when you have a timeslot selected
2. **Escape**: Closes the popout window for a new time entry
3. **Delete**: deletes a selected time entry
4. **Right click**: you can right click on an entry to Submit one entry
5. **F5**: refreshes your timesheet