SMART LATTICE

Cloud Application Platform

Time and Billing Management System

Salient Features.

- Single system to simplifying the process of Tracking Time, Billing, Managing Invoices, Generating Reports.
- Role-based security.
- Manual, Automatic and Lock After Days Approval Modes.
- Peachtree Integration.
- Dashboard widgets provide real-time visibility into productivity and cash flow.
- Vendor Analysis and Grading.
- Send Reminders via Email.
- Invoice Suggestions.
- Employees with Admin Role can approve timesheets

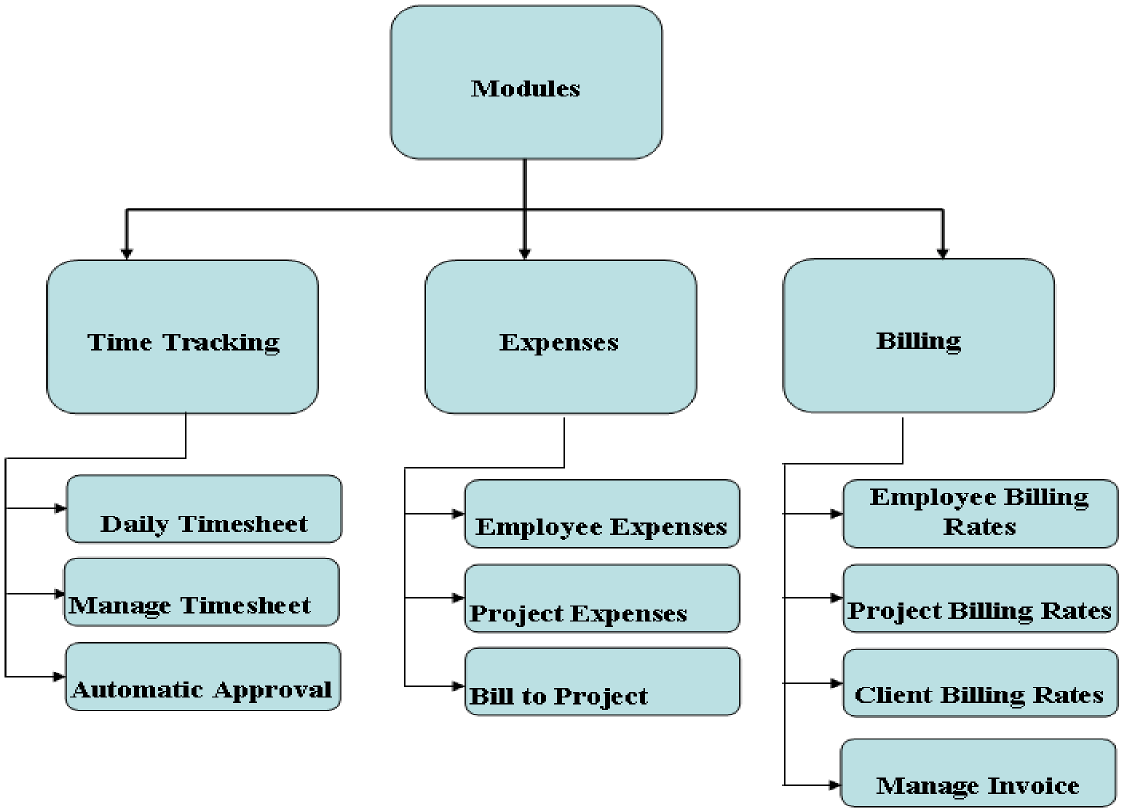
Introduction

- Time & Billing System is an advanced Web-based Solution for Companies to track their Employee hours along with an Intuitive Billing system to help achieve increase in productivity.

- Time & Billing can help you manage Employee Time sheets, Expenses, Clients, Vendors allowing real-time visibility into productivity and cash flow.

Modules

- Time Tracking
- Expenses Management
- Billing


Modules
Time Tracking
Expenses
Billing
Daily Timesheet
Manage Timesheet
Automatic Approval
Employee Expenses
Project Expenses
Bill to Project
Employee Billing Rates
Project Billing Rates
Client Billing Rates
Manage Invoice

Dashboard

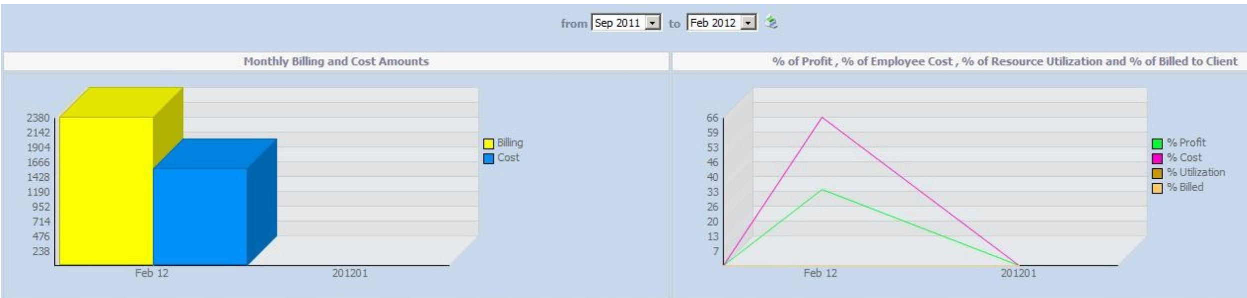

SMART LATTICE
Welcome admin1 | Backup App | Sign Out
TIME AND BILLING MANAGEMENT
Home
Company
VCS
Quick Tasks
Timesheet Console
Daily Timesheet
Employee Time Report
Summary Report
Employee Projects
Invoice Suggestions
Employee Expenses
Manage Employees
Manage Contacts
Manage Partners
Manage Projects
Help - Getting Started
List of available dashboard widgets.
Balance Snapshot
Invoice Analysis
Billing Chart
Total Cost Analysis
Key Customer Sales Accounts
Sales
Invoice Snapshot
Monthly Revenue Figures
Utilization Chart
Billable Hours
Vendor Analysis
Cost

Widgets

- **Balance Snapshot**: Calculates the overall profitability generated through the client, taking into consideration the amount received, the hours billed, expenses billed, cost incurred etc.

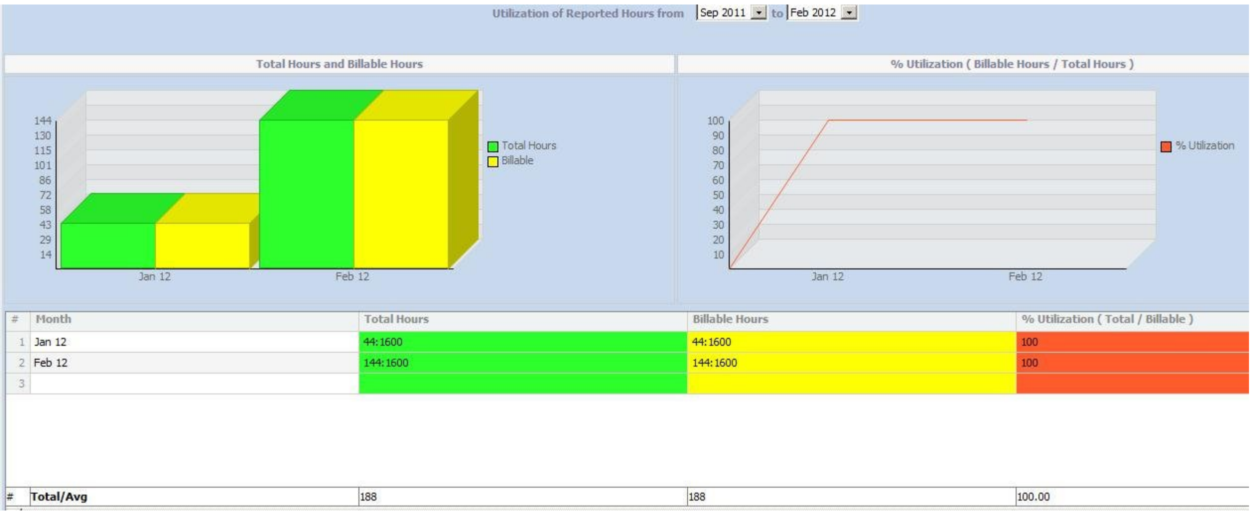
#	Client	Invoiced Amt	Recievables	Billed > 30 Days	Received	Bad Debts	Employee Cost	Expenses	Profit	Avg.Bill Rate	% Profit	Total Hrs	Billable Hrs	Billed H
1	General Motors	1,960.00	1,960.00	1,960.00	0.00	0.00	1,680.00	0.00	280.00	35.00	14.00	560000	560000	560000
2	GE	420.00	420.00	420.00	0.00	0.00	360.00	0.00	60.00	35.00	14.00	120000	120000	120000
3														
#	**Total/Avg**	2,380.00	2,380.00	2,380.00	0.00	0.00	2,040.00	0.00	340.00	35.00	14.00	680000	680000	680000

- **Billing Chart**: Shows the monthly billing and cost amounts as well as the percentage utilized as to percentage billed.



#	Month	Invoiced	Cost	Expenses	Profit	Avg Bill Rate	% Profit	% Cost	Total Hours	Billable Hours	Billed Hours	WIP Hours	WIP Amt	% Utilization
1	Feb 12	2,380.00	1,560.00	0.00	820.00	35.00	34.00	66.00	520000	520000	520000	0:00	0.00	0.00
2	Jan 12	0.00	480.00	0.00	-480.00	35.00	0.00	0.00	160000	160000	160000	0:00	0.00	0.00
3														
#	**Total/Avg**	2,380.00	2,040.00	0.00	340.00	35.00	17.00	33.00	680000	680000	680000	0	0.00	0.00

- **Utilization Chart**: Utilization% is the difference between the total hours and billable hours.



Master Setup Options

- **Company**
  - Basic Setup Options in Company, Billing Rates hierarchy.
  - Company level setting includes Week Start Date, Approval Modes, and Peachtree Integration.

- **Billing Rates**

The billing rate is one of the most important modules. There are three types of billing rates:

- Employee Billing Rate
- Project Billing Rate
- Client Billing Rate

According to the hierarchy the billing is done i.e. the employee billing rate is considered first and in absence of that the Project billing rate is taken accordingly, If the information is not present for either of the Billing rates, then client billing rate is Considered.

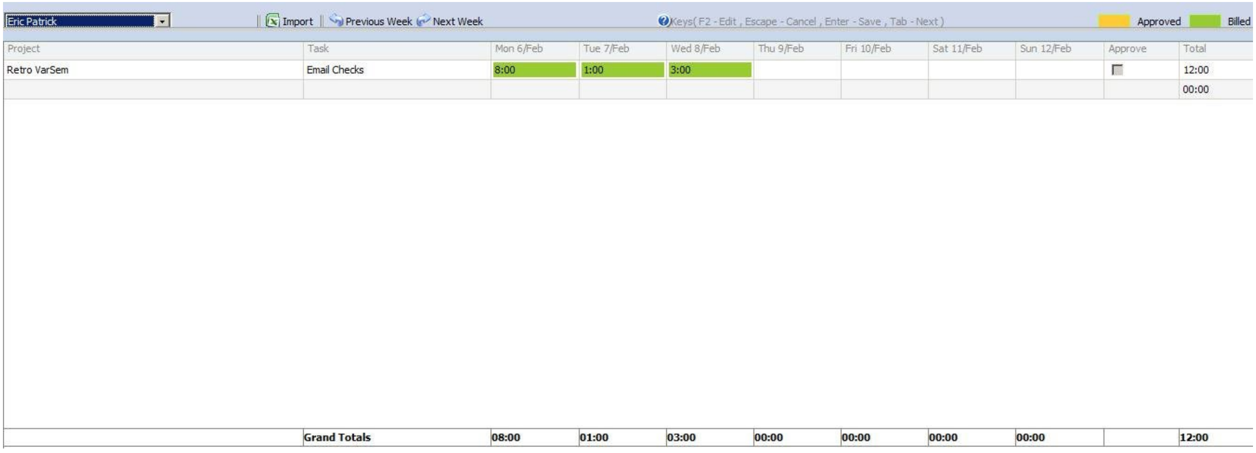
Employee Billing Rate

Project Billing Rate

Client Billing Rate

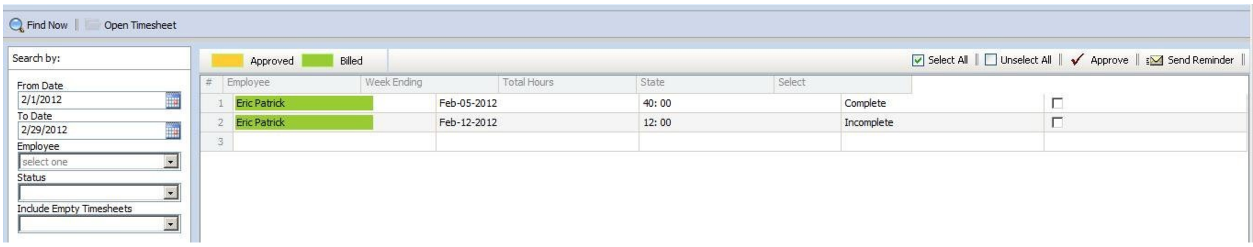
Daily Timesheet

- It Automatically Approves the Timesheet recorded by the employee if Approval mode is automatic.
- A comment can be added by selecting the F12 key against the cell.
- Projects the Employee is working on gets Updated automatically in Daily Timesheets.



Timesheet Console

- Provides a Week ending consolidated view timesheets .
- Timesheets can be approved.
- Reminders can be sent to employees.

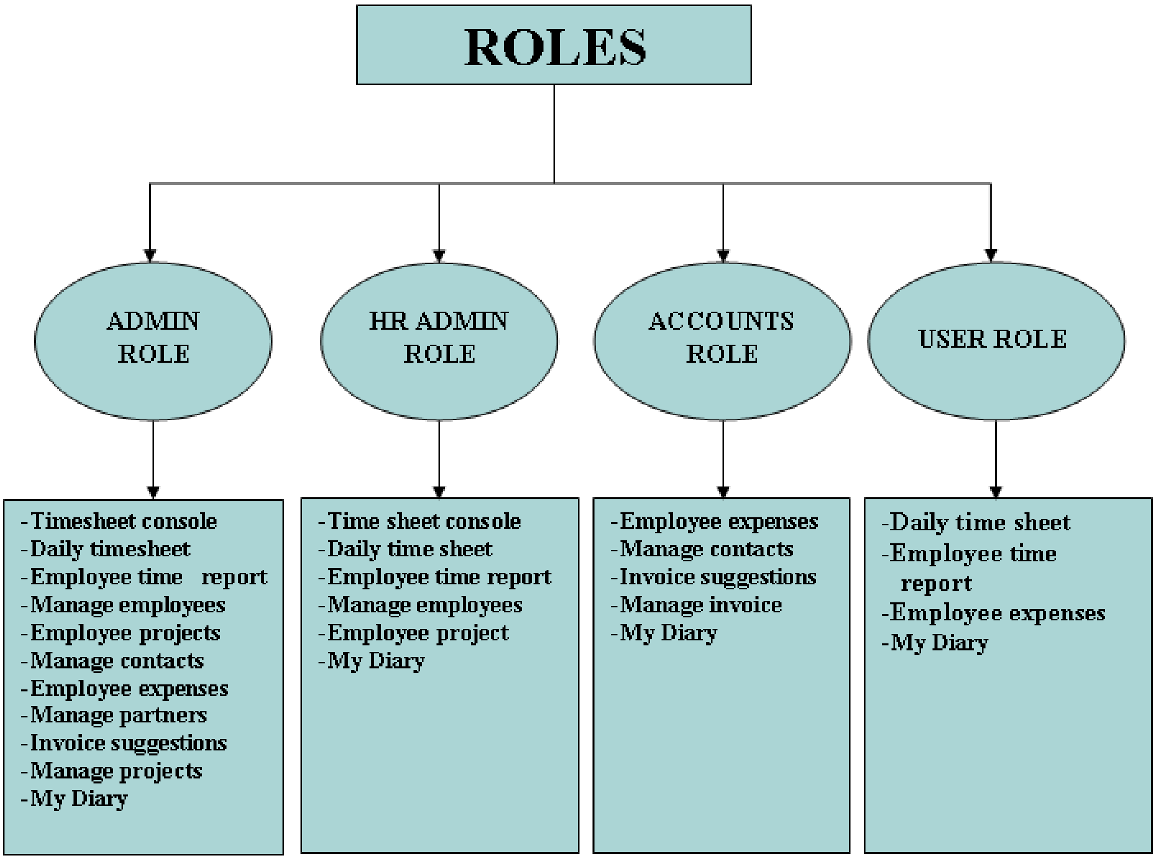


Invoice Suggestions

- Pending Invoices to bill are suggested.
- The option progress to invoice generates the invoice automatically.

Roles

- The Admin can access all the features.
- The HR Admin deals with features related to employees only.
- The Accounts Admin can generate the Invoice
- The User has to update the Daily Timesheets and Expenses.
- Each user and each role has a unique login id.



Reports

- Expense Report.
- Employee Time Report.
- Summary Report
- Invoice Export.
- Report Manager
  - Pending Invoices.
  - Bad Debts
  - WIP by Projects
  - Paid Invoices
  - Billed Expenses By Client
  - Unbilled Expenses
  - Expense By Type
  - Expenses to Company
  - Unpaid Expenses
  - WIP by Employee
  - Hours utilization by Task for Project