Bulk Job Timesheets Import

Labor hours and dollars may be applied to Jobs by importing a .csv file using the Timesheet option from the Job Management module.

When using this method, timesheets are imported into a batch for all Installers and all Jobs then the batch is posted to the Jobs at one time. An Imported Timesheet batch may be for a single day, a work week or a pay period; this depends on what your company finds the most practical to use. Just keep in mind, if Imported Timesheets are used and are not entered on a daily basis, your Jobs will not reflect Labor Costs until the Timesheets are entered and saved. If a Job is going over budget on hours/dollars, you may not realize this until days or weeks later.

The file that will be imported is a .csv file type. Below is a sample layout /definitions of the Timesheet Import file.

Before saving a timesheet import file, make certain to remove the Header row; the file may only contain timesheet entry rows.

Sample timesheet import file.

Below are the definitions for each column of the timesheet import file.

Follow the steps below to import a timesheet file.

1. From the Main Application Menu navigate to Job Management and select the Timesheets menu option.

2. The Timesheet Entry form will be displayed. At the top of the form enter a Description for the Timesheet batch.

3. Click the Import button located at the lower left of the form. The file explorer will open; locate and highlight the file to be imported then click the Open button.

4. The Timesheet records will fill into the upper tier of the Timesheet Entry form.

5. Review the timesheet rows carefully; if the data is correct, click on the Save button located at the lower right of the form.
If hours were entered in the Regular and Overtime units columns of the timesheet file, the application will automatically create two separate rows; one for the regular hours and one for the overtime hours.

If any invalid data was contained in the import file, the row will be displayed with a red font. If this occurs, do not save the batch; click the Close button on the Timesheet Entry form, open the import file, make the necessary corrections then import the file again.