Clock Out/In for Lunch

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The Clock-Out/Clock-In feature facilitates managing down-time for Technicians and Installers. The time span allotted for the Ticket or Job remains constant with the transitions from clocked-out to clocked-in, ensuring that a scheduler always knows when an employee is free or busy.

When Clocking-out on an Appointment, the software automatically creates a Miscellaneous Appointment for the period of time the Technician is "Clocked-out". When a Clock-in is performed, the Miscellaneous Appointment is ended and a new "continuation" Appointment for the Ticket or Job is created for recording time against the Ticket or Job.

The Clock-out & Clock-in is initiated from the Schedule Board by right-clicking on an appointment where the Technician has been marked as "On-Site" (green background color of the appointment).
Typical uses of the Clock-out & Clock-in feature would be:

- The Technician may take a lunch break during the scheduled Ticket or Job appointment.

- The Technician must leave the Site to pick-up parts, but plans on returning.

- The Technician must leave to assist at another Site, but plans on returning.

- The Technician may be delayed in traffic and you do not want to penalize your customer for the delayed drive time (or a portion of the delay).

The period of time between the Clock-Out and Clock-in will prevent labor hours and costs from being applied to the Ticket or Job. This time period will also not be considered when calculating total billable hours on Tickets.

There are restraints placed on the times that can be entered for clocking in and clocking out. The time of a clock-out must be later than the Dispatched time. Likewise, clocking-in (on a miscellaneous appointment) must have a clock-in time later than the start of the clock-out appointment.

Clock-Out on a Technician Appointment

To illustrate the Clock-Out and Clock-in feature, we will use the scenario of clocking the Technician out and in [on a ticket] for a lunch period.

Note: To be able to Clock-out on an Appointment, there must be either a Dispatch time entered or an Arrival time already entered.
From the Schedule Board, click once on the Appointment for the Clock-out then right-click. The Clock-Out form will be displayed.

The first field shown is the Clock-Out Reason; click on the drop-down arrow and make a selection. In this case we selected Lunch.
In the next field, Time, enter the clock-out time in hours and minutes, then click on the Clock Out button below the Time field.

The background color of the original appointment will change to Orange, which is the same color code for Go-Back tickets; we assume the Technician will "go-back" to working on the Ticket or Job after lunch. An new Miscellaneous Appointment is created and displayed below the original Technician Appointment - the end of the Miscellaneous Appointment will be the time that the Ticket or Job was initially scheduled to be finished.

Clock-In on a Technician Appointment

From the Schedule Board, click once on the Lunch Miscellaneous Appointment then right-click.
The Clock-In form will be displayed. In the Time field, enter the clock-in time in hours and minutes, then click on the Clock In button.

Once the Clock-In has been completed, the Miscellaneous [Lunch] appointment is ended and the continuation Ticket Appointment is shown below. The background color of the original Ticket Appointment [before the clock-out] will change to red. The new continuation Ticket Appointment background will change to green to indicate the Technician is back on Site and logging time to the Ticket.