LMN Time Setup Guide

Welcome to the LMN Time Setup Guide!

This guide will direct you on which order to go in when setting up LMN Time and it will also give you tips and tricks on how to set it up properly.

Let's start with the order that LMN Time should be setup in and then we will dive deeper into the fine details of setup.

1. **SETTINGS**

    a. Go through each tab on the menu on left side of the screen. It is important to have your settings setup correctly as it will affect how the system is run.
    b. Timetracking, payroll, payroll codes, job types, cost codes, company info, rates, activities, default tasks.

2. **STAFF**

    a. Add all staff to your LMN Time account if they are going to be using the system. Whether they are a crew member, foreman or office staff, they will all have to be entered into the system in order to have access.

3. **JOBS**

    a. Add a new job or import an estimate from LMN.
    b. Job information, tasks, hourly rates, activities, groups, notes, schedules, payroll.
    c. Check out Job Groups on the left side menu and add if you want to setup a route that is separate from the schedule for your foreman to clock into. Job groups work great for snow or maintenance routes.

4. **SCHEDULE**

    a. Go through each tab on the menu on the left side of the screen. You must do some setup before adding jobs to your calendar.
    b. Holidays, schedule crews, service types, & work calendars.

5. **TIMESHEETS**

    a. Once steps 1-3 have been setup, you will now be able to create timesheets for daily timetracking.
    b. After timesheets have been submitted by your foreman, you will be able to approve time via the "approve time" tab on the left side menu.

STEP 1: SETTINGS

Timetracking:

Track Hours by Work Areas/Service if you want to be able to customize your task names. Otherwise they will remain the exact same as the cost code you set your task to [track by work areas/service is highly recommended].

If you are planning on integrating with QuickBooks, make sure you have the setting on that says "**Yes, Enforce Cost Codes**."

Set **Time Zone**. If not set properly it will interfere with proper time tracking.

Allow Crews to Leave Timesheet Notes Blank if you want foreman task notes on clock out to be mandatory change this setting to **No** [recommended].

In LMN Estimating, every estimate has crew notes. If you want to be able to import those crew notes directly into LMN Time as task notes that your foreman will see every time they clock into the job, turn this setting on.

Set your **Average Working Hours Per Day** (per employee), **Default Lunch Time** and **Default Lunch Duration**.

If in Canada set your **Distance Display Format** to **Kilometers**.

Click **Company Info** in your settings menu. Fill this out with your own company information if it is not already filled out.

Payroll & Payroll Codes:

Click **Payroll** in your settings menu and adjust the settings to match your own company payroll setup (consult your accountant if needed).

Set your **Default Payroll Codes**. These will automatically be applied to your jobs unless you override them in the job itself.

You can also set **Default Payroll Codes** for each **Job Type** (just a deeper form of organization). These will override your default payroll codes that you set in your general **Payroll** setup. You can set these in **Job Types** which is in your side menu when you are in **Settings** [we recommend setting each job to an accurate job type for better organization of your jobs].

Click payroll codes in your settings menu. Set up your payroll codes in LMN Time to match your QuickBooks payroll items because you will match these in the LMN QB Sync Tool for payroll purposes.

Job Types:

Double check your **Job Types** and make sure task notes are also turned on in there, as they will override the default "require task notes on clock-out" setting in your general settings in Step #1.

Company Info:

Enter in Company Information if blank.

Rates:

Enter default hourly rates if you do Time & Material type work and need to track items hourly. These rates will generate in a list when you click to add a new rate to a job during job setup.

Activities:

Enter default activities if you are going to track certain activities that your crews have completed. Activities act like a checklist when your crews clock out of each job. You can also set these activities to track quantities, when your crews clock-out they will be able to enter in the amount of the item that they used on site. These default activities will generate in a list when you click to add a new activity to a job during job setup.

Default Tasks:

Enter default tasks to generate tasks automatically when creating a new job in LMN Time. Tasks are what your crews are going to clock into right when they get to site, it defines what they are working on at that particular job site.

STEP 2: STAFF

All staff must be entered into LMN Time before they can login through the app. Even if the employee has access to LMN budgeting & estimating they will have to be added into LMN Time as a user. If they do have a login for LMN then all you will have to do is link their existing LMN login to LMN Time. If not, you can create a username and password right in LMN Time for them.

Staff:

Click **+ Employee** in the bottom right corner in staff (located in the top menu).

Choose whether they are a **Regular Employee**, **Foreman** or **Admin** user. Only foreman can clock staff into jobs. Admin users can setup jobs, create schedules, approve timesheets (as well as act as a foreman if needed) etc.

If they are already an existing LMN Estimating user, you can simply link their account when you add them as staff in LMN Time. If not, click on the dropdown menu where it says existing user, and change choose new login. This will allow you to create a new username and password for that employee.

Is the staff member a subcontractor? If so, check off **Subcontractor** so that their hours don't move over to QuickBooks (if you use that feature).

Is the staff member salaried? If so, check off **Salaried** so that when you move their hours over for job costing, QuickBooks will break down their salary pay by how many hours they worked on the specific job(s) for that pay period.

Do you want the foreman/admin user to be able to track what other staff members are working on? If so, check off "**Can Track Employees**."

You can click **Hide Jobs** (in the top menu while editing a staff member) if you want a specific foreman or admin user to be able to see specific jobs on clock-in. This is great for subcontractors or if you have certain crews that only work in certain geographical areas (or only work on certain types of jobs... ex. maintenance vs installation).

You can **Hide Staff** (in the top menu while editing a staff member) if you want a foreman or admin user to be able to see specific staff on clock-in. This is great for subcontractors or if you have certain crews that only work with certain staff members and you want to simplify their clock-in process.

On clock-in, a foreman can choose a **Staff Group**, which may have the staff he works with on a regular basis (or who you want them to work with) already selected for them to clock-in. When adding staff, you can assign them to a staff group on setup.

Staff Groups:

Staff groups allow you to group staff together so that when your foreman clocks in his crew it allows him to choose a whole staff group verses each individual person.

To create a staff group, simply click **+ Staff Groups** and give it a name. Then click back into Staff and choose the employee that you want to add to that staff group. Click on **Group Membership** and click on the staff group that you would like to add that employee to.

Crew Locations:

This map is going to show you crew locations within the last 48 hours or all time.

Crew Progress:

This map is going to show you crew locations by supervisor. You need to make sure that the supervisor had chosen themselves when they clocked into the timesheet or nothing will appear on this map. You can filter by date, job location and clock-in location.

Where Are They?:

This list is going to show you exactly where your crews were when they clocked-in to a job site. You are able to filter by the last 48 hours or all time and by the employee name, supervisor name or job/task. If you click on the orange map pin it will link you directly to a google map with the crew's location on clock-in.

Daily Dashboard:

This is where you can see your tracked employees. Foreman have the ability to setup employees they would like to track from the LMN Time App. Through this dashboard you can see which employees you are tracking and their last clock-in and out times.

STEP 3: JOBS

Jobs must be entered into the system so that your foreman can clock their crews in and out each day. There are two ways to create jobs in LMN Time: you can import your LMN estimate into LMN Time or you can manually create a new job in LMN Time if you do not have an estimate created in LMN already.

LMN Estimate Import to LMN Time:

If you already have an estimate created, you can click JOBS and then **+ Import** icon in the bottom right task bar. If you do not have an estimate already created, you can go back to LMN Estimating and create the estimate [recommended], or you can click **+ New Job** to create your LMN Time job on the fly.

Import Job from Estimate: Search for the estimate, and don't forget about the search filters to the right! Choose your job name, job type (remember those have default payroll codes attached to them!), and if you want the crew notes imported as they will show up as the **Task Notes**.

If the job is a time & material job, please skip to step #5 and then revert back to this step when you have set up your hourly rates. Then check off "hourly" for those tasks on import [note: you can NOT switch back and forth from hourly once you have time tracked against a task, or vice versa].

New LMN Time Job (No Estimate Import):

Click **+ New Job** in jobs. Choose job type, enter job name, job address and customer name. Click OK.

Job Info:

Verify the job address by clicking "show map" beside the address. LMN Time addresses are very important as the GPS functions will not work if the address is faulty. The longitude and latitude MUST be correct [TIP: if the address is in the middle of nowhere, right click on the location in Google Maps and click "What's Here?" Copy those GPS coordinates into your LMN Time job setup to get accurate time-tracking data!!]

The **Job Short Name** is also very important. This is what is displayed on the field app. You can change the default in your general settings as well.

LMN Time App Links:
o **Link - Street Map**: use the Google Maps URL for the property. This will become a "map" button on the field app for your foreman on the field.
o **Link – Site Map**: perfect for snow and maintenance jobs. Use a third party program like "snag it" to take shots of the property through Google Maps. Then highlight certain areas and add directions for your field crews. Upload it to Google Drive or Dropbox and paste the file link here. They will be able to view that by clicking the Site Map button on the field app [TIP: make sure the file is set to "public" or else the foreman will be forced to a sign in page!!]
o **Link – Other**: Similar to site map above, although this link is for whatever you have a need for! Some companies even upload the complete job planner here so that the foreman can access it on the field.

Tasks:

Click tasks in your side menu. You will need to add your job tasks in a way that won't confuse your staff when clocking in. Tasks are anything that needs to be tracked by time (ex. Lawn Maintenance, Garden Installation, Front Patio, Snow Plow and Salt... etc.). Make it simple and easy!

Cost Codes come from LMN Estimating. If you haven't set these up yet you will need to do so there. If you haven't started that... please ask support!

Save.

Hourly Rates:

In your **Settings** click **Rates** in the left menu.

Click **+ Add Rate** in the bottom right hand corner.

Rates can be used for labor, as well as equipment. You can also set it to a flat rate, or hourly rate. Example:
  o   GM-Maintenance Labor, $42/hour
  o   GM-Horticulturalist, $55/hour
  o   LC-Excavator (Small), $85/hour
  o   SNOW-Loader + Pusher, $140/hour

After you set up your rates, click "**Hrly Rates**" in a job, and then **+ Add Rates** in the bottom right hand corner.

Also, make sure to turn on "**Track Hours and Rates for Billing-by-the-Hour**" in the job task(s) setup, or else your foreman will not be able to clock into those rates in the field when clocking into the job [note: you can NOT switch back and forth from hourly once you have time tracked against a task, or vice versa].

Activities:

In your settings, click **Activities** in the left side menu. Activities are attached to a job, and are anything that isn't tracked by time (as opposed to tasks). They are like a check list that your foreman uses, and they can be materials. Examples:
  o   Did you use mulch? If yes, click that activity and if a quantity is applicable specific how much of it you used.
  o   Snow Plow "Complete" (no quantity involved).
  o   Did you use salt? If yes, click that activity and if quantity is applicable specify how much you used.

After you set up your activities, click "**Activities**" in a job, and then **+ Add Activities** in the bottom right hand corner.

When adding activities, you will be able to override the defaults that you set up in your settings on a "per job basis" as jobs can always be different.

STEP 4: SCHEDULE

Once your staff and jobs have been entered into LMN Time, you are now able to start adding those jobs to your schedule. Please click on "**Schedule**" and then start working your way up on the left side menu from "**Holidays**" up to the "**Whiteboard**".

Holidays:

This is where you are going to want to add all upcoming holidays for the current year.