



Alloc8 User Guide

Excluding Set Up and Pack Up From Invoice

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Excluding Set Up and Pack Up

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Overview

If you do not charge certain clients for Set Up and Pack Up time on a job, you now have the option to exclude this recorded time from your workers' shift hours on the job invoice with this feature.

This feature is for invoicing purposes only – recording set up and pack up time on a Timesheet does not change the hours worked in payroll interpretation and your workers will not be paid any differently.

New Set-up and Pack-up columns on the Timesheet

When this feature is enabled, both the mobile app and Timesheets on the web will show two new columns at the end of the Timesheet.

Name	Travel Start	Shift Start	Break Start	Break End	Shift End	Travel End	Set-up Time (Hrs)	Pack-up Time (Hrs)
Alexander Smith	--:--	--:--	--:--	--:--	--:--	--:--	--	--

There are incomplete fields in your timesheet.

Workers should record their Timesheet in the same way they usually do, and enter the **duration** of the set up time and/or pack up time in these columns, in increments of 15 minutes. Once entered, a number – rather than a time – will be displayed in this field, ie.

15 minutes = 0.25

30 minutes = 0.5

45 minutes = 0.75

1 hour = 1

If crew members have different durations of set up and pack up, this can also be entered on the Timesheet. Likewise, if a worker did not do any set up and pack up, leave these columns blank for that worker.

Then, sign and submit as normal.

Excluding Set Up and Pack Up from the job invoice

If you are using this feature, you will now also see a new checkbox on your individual rate cards. This functions the same way that Job Trim works, however it will remove the time that is recorded on the individual job timesheet as opposed to a fixed time.


Under Timesheet Adjustments on the rate card, check 'Exclude Set-up and Pack-up time from Shift Hours.

Timesheet Adjustments

Applied Adjustments

- Charge for Employee Breaks
- Charge for Equipment Breaks
- Round all hours to nearest 15 minutes
- Exclude Set-up and Pack-up time from Shift Hours

Now, when invoicing, the duration of Set Up and Pack Up will be removed from the hours worked – and recalculate the Shift Start and Finish Time on the Timesheet.

Employee	Travel Start	Shift Start	Break Start	Break End	Shift End	Travel End	Set-up Time (Hrs)	Pack-up Time (Hrs)
 Alexander Smith	7:00	7:30	12:00	12:30	15:30	16:00	0.25	0.25
 Arthur Morgan	7:00	7:30	12:00	12:30	15:30	16:00	0.25	0.25
 Dutch van der Linde	7:00	7:30	12:00	12:30	15:30	16:00	0.25	0.25

As shown above, all workers started at 7:30 and finished at 15:30, with 0.25 hours (15 mins) of both set-up and pack-up recorded.

The following examples show how an invoice will interpret the above Timesheet when Set-up and Pack-up is excluded on the rate card.

1. When Travel is **not** charged

Set Up and Pack Up will be removed from Shift Start and Shift Finish times, making the shift hours 7:45 - 15:15.

07:45-15:15

3 person crew Day Rate 0-8 hrs

7

2. When Travel is charged **as Shift Hours**

Set Up and Pack Up will be removed from Travel Start (07:00) and Travel Finish (16:00) times, making the shift hours 7:45 - 15:45.

07:15-15:45

3 person crew Day Rate 0-8 hrs

8

3. When Travel is **charged separately**

Set Up and Pack Up will be removed from Travel Start and Travel Finish times and display this new time on the invoice, however the full amount of travel will be charged and the Set Up and Pack Up time will be deducted from the worked hours.

In this case, Set Up and Pack Up will be removed from Travel Start (07:00) and Travel Finish (16:00) times, making the shift hours 7:45 - 15:45, However, the full hour of Travel is still applied and charged as a separate line on the invoice.

07:15-15:45

3 person crew Day Rate 0-8 hrs

7

Travel Time - 3 person crew Day Rate 0-8 hrs

1

When Set Up and Pack Up times vary on a job

The invoice will recalculate the shift for each worker based on their individual set up and pack up time.

Using packages

A package will not form when there are varying Set Up and Pack Up times for workers. In order to remove Set Up and Pack Up from the correct rate bracket, the individual worker shift start and shift finish are modified. Therefore if there are differences between Set Up and Pack Up duration for workers, those workers will not form in a package.

The below example illustrates a scenario where both workers record the same Shift times, but the Driver recorded Set Up and Pack Up time. Here, the Driver's shift time will be considered as 7:15 - 16:15.

Employee	Travel Start	Shift Start	Break Start	Break End	Shift End	Travel End	Set-up Time (Hrs)	Pack-up Time (Hrs)
Alexander Smith	6:30	7:00	12:00	12:30	16:00	16:30	0.25	0.25
Beatrice McShane	6:30	7:00	12:00	12:30	16:00	16:30		

Only form packages for shifts with the same Start and Finish times

When this box is **checked**, the package will not form as the shift start and finish times vary. Each shift is billed as a separate line item.

07:00-16:00	
Traffic Controller Day Rate 0-8 hrs	8
Traffic Controller Day Rate 8-10 hrs	0.5
Traffic Controller - Major Project Allowance	8.5
07:15-15:45	
1 person crew Day Rate 0-8 hrs	8

Only form packages for shifts with the same Start and Finish times

When this box is **unchecked**, the package will form for the common time of 07:30 - 15:30, and the additional time for the worker who did not record set up or pack up will be billed separately.

07:00-16:00	
2 person crew Day Rate 0-8 hrs	7.5
07:00-16:00	
Traffic Controller Day Rate 0-8 hrs	1

FAQ

Is Set Up and Pack Up time removed from other items on a job?


If the asset is a vehicle, it will follow the shift time of the operator and any Set Up and Pack Up will be removed from the total time of the asset on the job. However if the asset does not require an operator, the **full job time will be charged**.

Set Up and Pack Up will not affect any items that use 'Daily' billing.

The below example shows a 12 hour job with a single Traffic Controller and a Portable Traffic Light Set (asset) allocated to the job.

Resource	Allocation	Start Time	End Time	Equipment / Operator
Portable Traffic Light Set #1	PTL002 - Portable Traffic Light Set	9:00	21:00	
Traffic Controller #1	John Marston	9:00	21:00	

On the **timesheet**, the Traffic Controller records 0.5 hours of set up time and 0.75 hours of pack up time:

Employee	Travel Start	Shift Start	Break Start	Break End	Shift End	Travel End	Set-up Time (Hrs)	Pack-up Time (Hrs)
 John Marston		9:00			21:00		0.5	0.75

On the **invoice**, Set Up and Pack Up is removed from the Traffic Controller's work hours, but the full 12 hours is applied to the asset.

09:30-20:15	
Traffic Controller Day Rate 0-8 hrs	8
Traffic Controller Day Rate 8-10 hrs	0.5
Traffic Controller Night Rate 8-10 hrs	1.5
Traffic Controller Night Rate 10+ hrs	0.75
09:00-21:00	
Portable Traffic Light Set	12

How are allowances applied?

The recalculated hours will also apply to any hourly allowances. For example, if a worker records a 10 hour shift, and 1 hour of Set Up and Pack Up, the shift will become 9 hours. Any hourly allowances applied to that shift will be charged at x9 hours.

Which rate is Set-Up and Pack-Up excluded from?

As the invoice will calculate a new shift time, the application of Day / Night rate will be applied to the new shift start and end time.

How does Set Up and Pack Up work with Minimum Billing hours?

Minimum bill hours apply to the adjusted shift time. So if the shift hours are less than the minimum hours after removing Set Up and Pack Up, the usual minimum top up will apply. This may result in 'cancelling out' the removal of set up and pack up.