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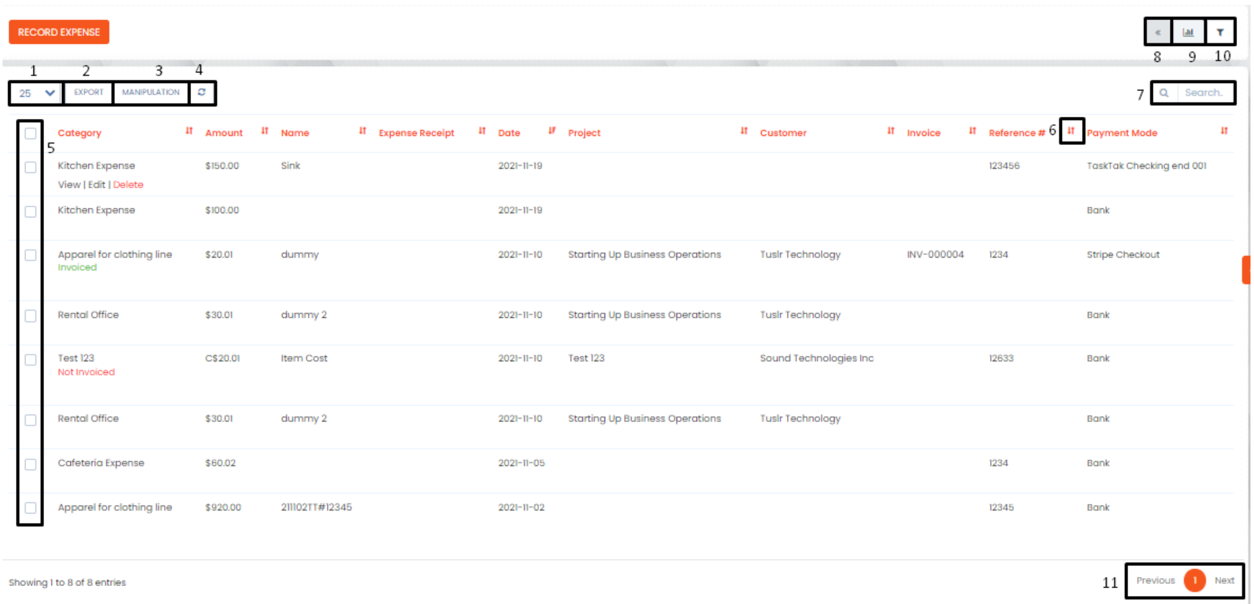
TaskTak User guide – Expenses

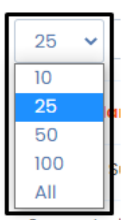
All the expenses done by Tasktak is recorded here.

Expenses Table

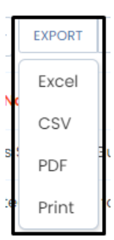
This table will contain all the data associated with expenses.



1. The dropdown represents the number of data which can be selected to show on the table using the scroll down for that page.

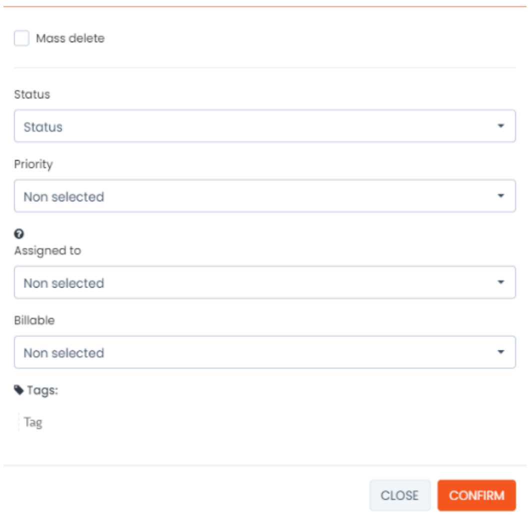


2. The data can be exported into excel, csv and pdf format and this system also has the option to print the data - when clicked upon the Export button.

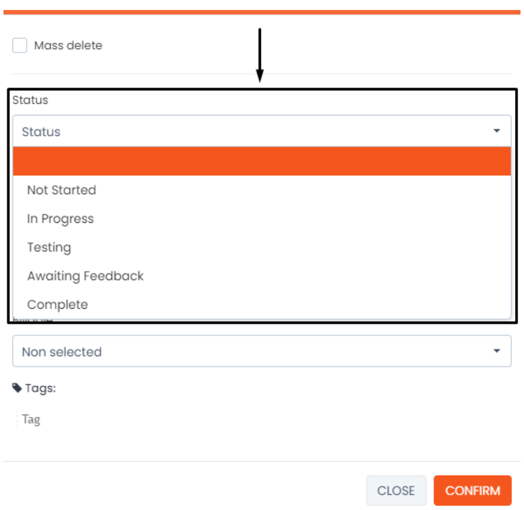


3. The

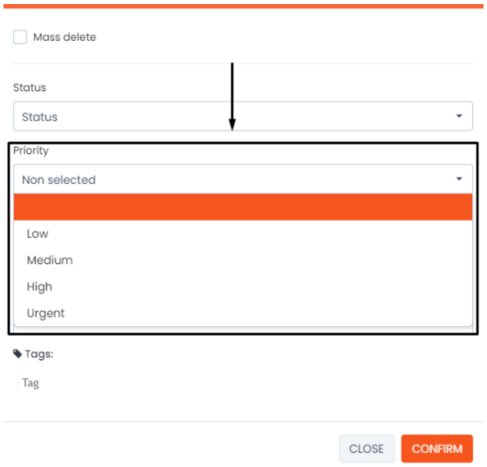
button works when the user selects multiple tasks and the following UI shown below is shown when this button is clicked.



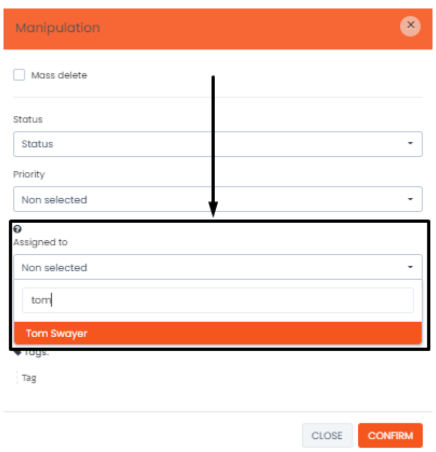
If the Admin user wants, he/she can delete the selected data by checking onto the "Mass Delete" box.



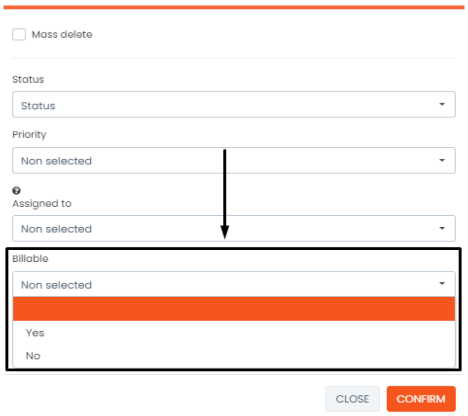
Admin user can select the priority of the selected tasks. All the selected tasks will have the same priority.



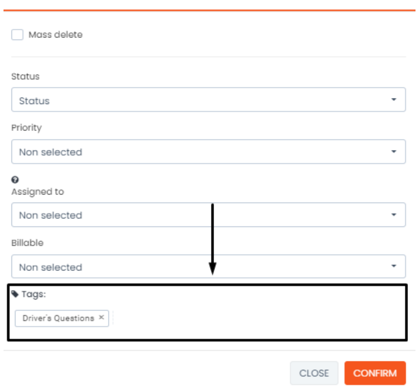
Admin user can select the status of the selected tasks. All the selected tasks will have the same status.



The admin user has the liberty to assign the selected tasks to one or multiple staffs.



Admin user can choose if the selected tasks are billable or not. The selected option will leave impact on all the selected tasks.



Tags can be provided by the admin for the selected tasks. They are given to describe the task in short terms.

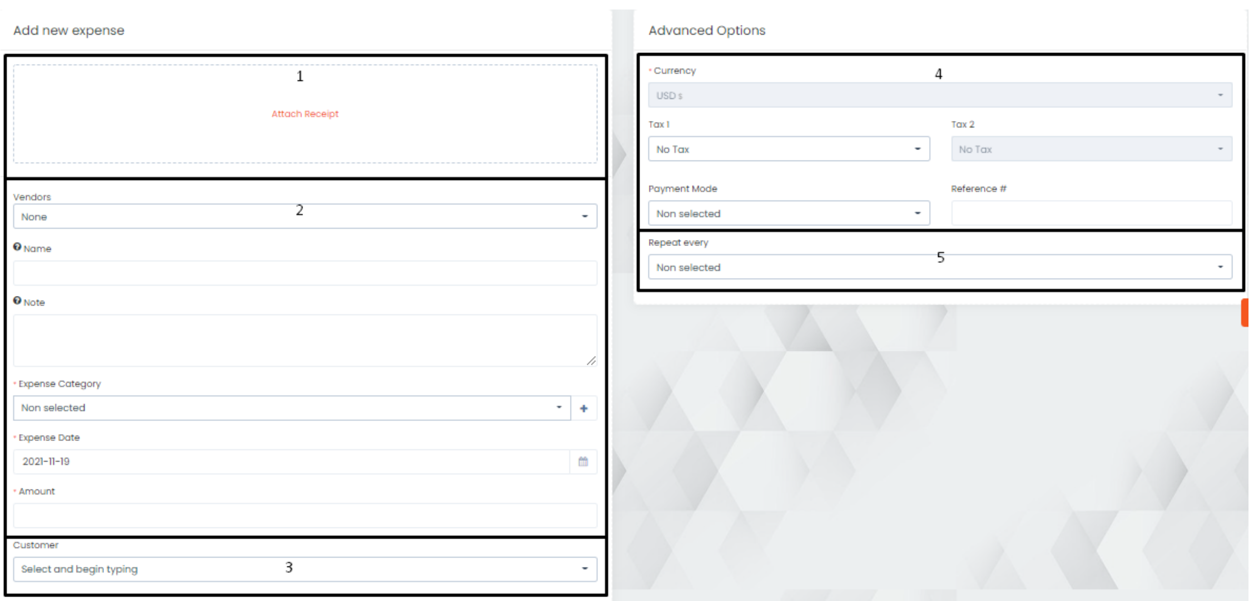
Afterwards the admin has to press "Confirm" the button if he/she wants to save the data. If not, the admin can select the "Cancel" button to dismiss the changes.

4. The button will help the Admin User refresh the table.
5. Admin can select one or multiple items from the table.
6. The button helps the user to order the set of data from its highest to lowest or from its lowest to highest order.
7. A search bar is present at the top on the table, which helps the user to search for any data instantly.
8. The icon will help the admin to change the size of the table to full size by clicking on the contents from the table.
9. The quick statistics dashboard shows the total expenses for the project spent in the "Total" box. Billable expenses show the amount of expense that can be billed for the project. Non billable items are those which are not yet entered into the database under expenses section but are spent for the project. "Not Invoiced" items are those whose bill is not recorded to the system. The "billed" items are those which have been approved and paid by the authority for the project.

10. Admin can filter the data and view on the table by clicking on the icon.
11. When there will be a large amount of data, the admin users will be able to view the next or previous set of data by clicking on the "Previous" and "Next" button. The numbers will indicate the number of the page.

RECORD EXPENSE

Expenses can be recorded by clicking on the "Record Expense" button.

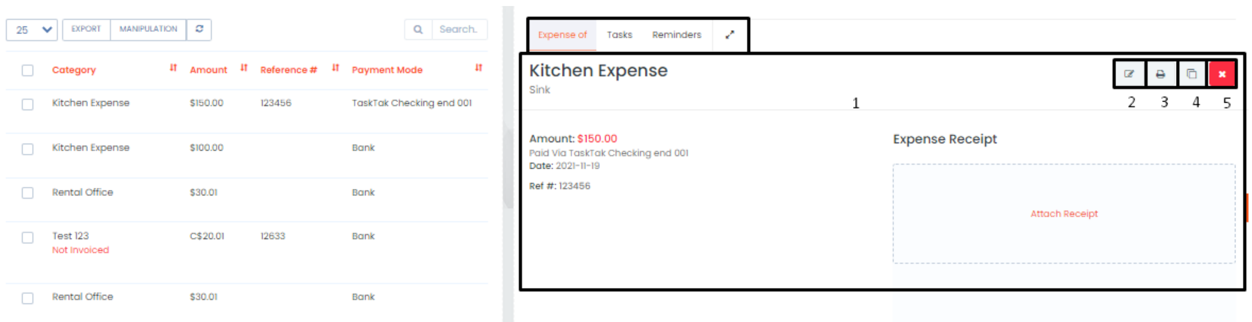


1. Receipts can be added using this option.
2. Admin must provide the vendor's name for the product with product name, note if any additional details is required to add, expense category to determine under which group the expense falls under, expense date on which the expenditure was done, and the amount.
3. The customer company's name needs to be selected from the dropdown.
4. Currency type, tax, payment method and reference are added in this field.
5. If the expense is done frequently within a fixed specific timeframe and the expense needs to be added to the system for record, this option will help the admin to avail this facility.

View/Edit/Delete Expense

Admin can view and edit the expense by moving the cursor over the expense name.

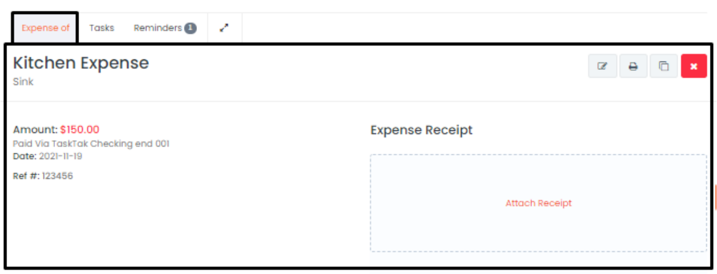
View :



1. All the data related to the sections will be shown here. However, the sections are discussed below.

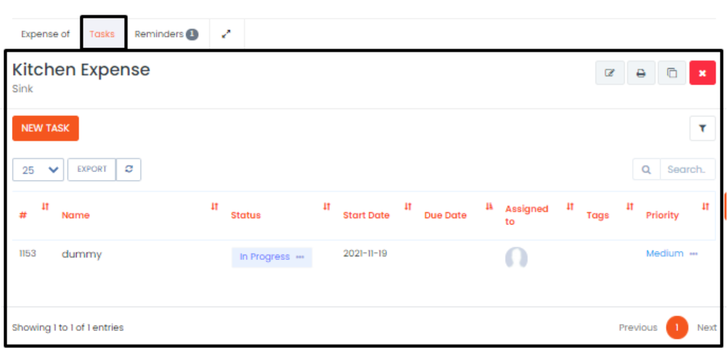
Expense Of :

The expense details are displayed here.



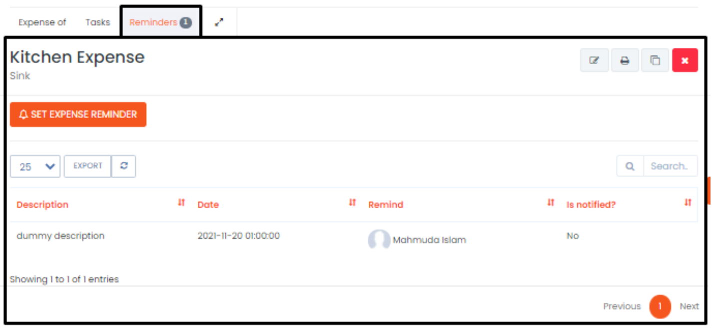
Tasks :

Tasks associated to the expenses are created, viewed, editted and deleted through this section.



Reminders :

Reminder associated to the expense can be set, edited and deleted through this section.



Toggle Full View :

The icon will help the admin to change the size of the table to full size by clicking on the contents from the table.

Edit :

Admin can edit expense by clicking on the “Edit” option, which can be found when the cursor is moved over the expense category. When an expense is edited, the detail for that expenditure is modified.

Delete :

Admin can delete an expense by clicking on the “Delete” option, which can be found when the cursor is moved over the expense category. When an expense is deleted, the expenditure is removed from the table.