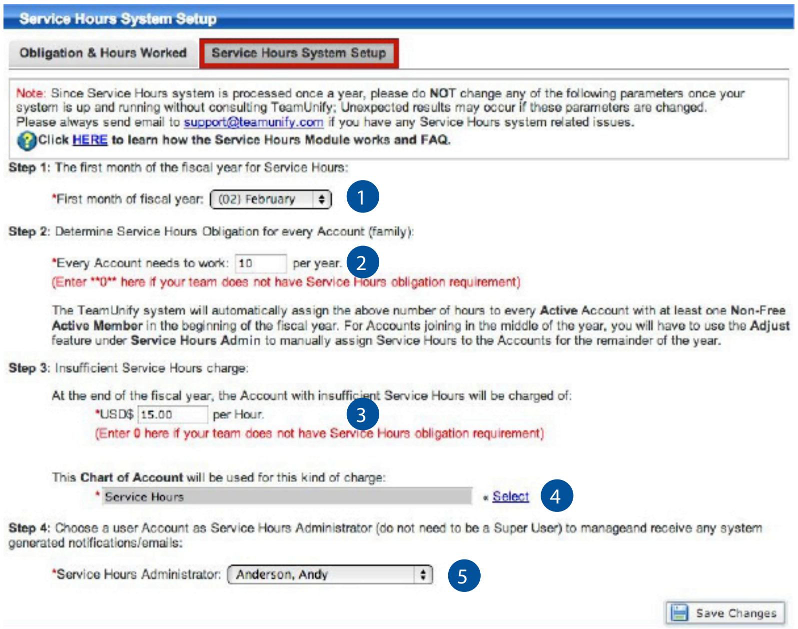
Service Hours Setup & Management



Tips and Tricks

The Service Hours module uses the term yearly and hours. Think of these in terms of session and hours or credits.

Each time your service hours module rolls over based on step #1, you will need to come back into the system setup tab and move step #1 to the next month you would like

1 **Step 1 - First month of fiscal year** - THIS DOES NOT accurately represent what this designator means. It's billing terminology only. This is the month you want to roll your service hours. If you roll your service hours (ie: reset the obligation and bill un-met hours/credits) quarterly for instance, you will change this month four times a year instead of once.

Select the month that you want to roll. If you select February it will roll, update obligations and bill on February 1st during the billing cycle.

2 **Step 2 - Determine Service Hours Obligation for every Account (family)** - This is the obligation that your accounts need to work per SESSION. This does not need to be per year. It will reset your accounts and apply this number based on step #1.

3 **Step 3 - Insufficient Service Hours Charge** - This dollar amount will multiply against the amount of un-met obligation hours/credits not met in step #2 and charge on the month selected in step #1.

4 **Step 4 - Service Hours Administrator** - This gives you the ability to select any account, no matter what admin level, and have them administer the Service Hours Module only.

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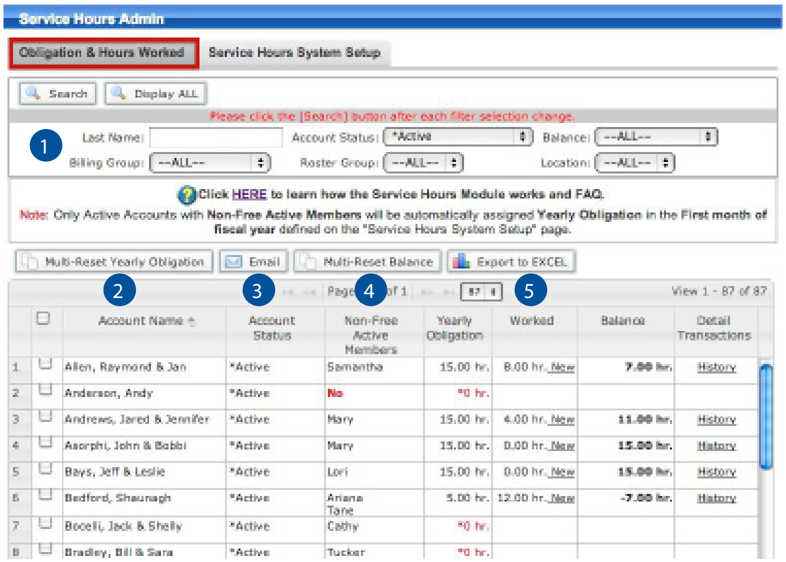

Tips and Tricks

TeamUnify suggests manually setting the obligation the first time you setup this system. By doing this within this area, you can set step #1 in the Service Hours System Setup, to the month you want the system to roll for the first time.

1 **Filters-** Use the filters to bring up select accounts.

2 **Multi-Reset Yearly Obligation** - Select all or individual accounts and use this option to manually apply the obligation. THIS DOES NOT need to be a yearly obligation. This will be the obligation for the period you set the system for. If you do your system quarterly and it's 10 hrs/credits quarter, then place 10 in the obligation field.

3 **Email -** Select one or many accounts and use the email button to send a free form email.

4 **Multi-Reset Balance -** Use this option to update the balance.

5 **Export to Excel -** This report will generate the history of jobs completed.

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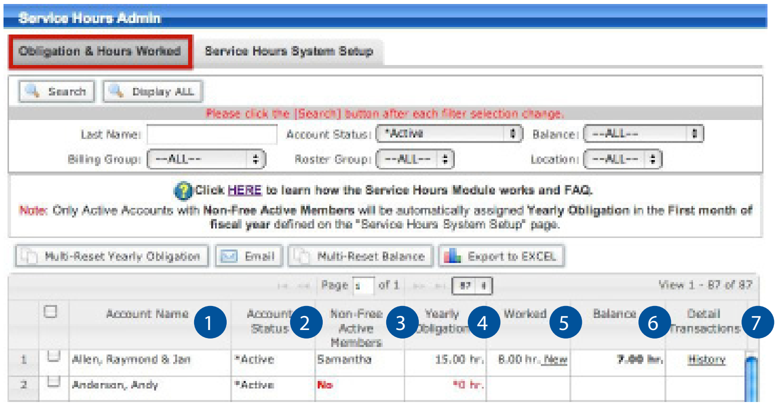


Tips and Tricks

Your accounts can see exactly what their obligation is, jobs currently worked and history. Once they are logged in, if they go to My Account > My Invoice/Payment > Service

1. **Account Name-** The account name as setup in TeamAdmin > Account Member Admin.

2. **Account Status** - This is the status set in account/member admin.

3. **Non-Free Active Members-** Any active athlete that is in a billing group not designated as 'Free'. All athlete's will be listed here. If you see a red '**No**' this account will not have an obligation applied unless done manually. The '**No**' designator means this account has no paying members through the recurring billing system.

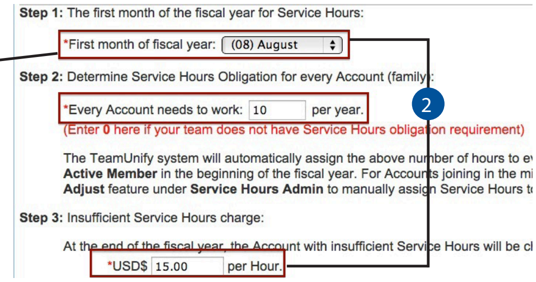
4. **Yearly Obligation -** The obligation amount set in step #2 or using the multi-reset yearly obligation. Remember this DOES NOT need to be yearly.

5. **Worked-** This amount will update automatically if you use the jobs module and set the jobs as 'worked' within. Otherwise you can manually use the 'New' button to add hours worked.

6. **Balance -** This is the difference between the obligation and the hours/credit worked.

7. **Detail Transaction -** Select the 'History' link to view all obligations set and hours worked for the lifetime of this account.

Service Hours Setup & Billing



1 **Billing Overview-** The billing schedule overview lets you know when you will be billing for un-met obligation hours based on step #2. Billing will happen on the first of the month which will reset everyone's hours to those denoted in step#2 and invoice simultaneous.

2 **Service Hours System Setup** - The billing system will bill based on step #1 in this setup.

Account	Previous Invoiced	Previous Paid	Current Invoiced	Current Amt
Bedford, Shaunagh	$225.00	$225.00		$350.00
			==>Volunteer Hours (2013) 10.00hr. Xfer	$150.00
			Ariana (1st) Bronze/Monthly	$100.00
			Tane (2nd) Bronze/Monthly	$100.00

3 **Billing Simulation Report** - If you run your billing simulation report during the billing month for your service hours you will see all accounts and their pending charges.

Service Hours Setup & Billing

Frequently Asked Questions

Q **What do the red asterisks and numbers mean on the Obligations & Hours Worked page?**

A Once the yearly obligation is generated for all the accounts, the system continuously monitors
membership changes. A red asterisk will appear under the "Yearly Obligation" column if any of
these conditions is true:

1. A brand new account is added to your team.
2. Account status changed from Active to Non-Active or vice versa.
3. New member added to or removed from the account.
4. Member status changed from Active to Non-Active or vice versa.

The asterisks simply visually indicate a something has happened with the account. They do not effect anything financially.

Q **My team originally set the per account obligation as 20 hours per year but decided to change it to a new obligation amount. What are the steps that I have to do?**

A 1. Set the new amount in the "Service Hours System Setup" tab.
2. Go to "Obligation & Hours Worked" tab.
3. Select all accounts and use the "Multi-Reset Yearly Obligation" to increase or decrease the yearly obligation for every account.

Q **I want to generate service hours invoices more than once a year. How do I do this?**

A After the system hits the 1st of the "First month of fiscal year," generates the invoices, and resets all amounts, simply go to Service Hours System Setup, change the "First month of fiscal year" to the next period, and click Save Changes. It will then generate invoices again once it hits the next 1st of the month you picked. Changing the month does absolutely nothing until that next period arrives; i.e., no balances, hours or obligations are affected.

Q My billing system is not active. How does that effect things?

A With an inactive billing system, SH Admin simply becomes a place to monitor hours worked. Nothing ever gets automatically reset nor are invoices ever generated. If you arrive at a new season and want to reset everyone's hours worked and obligations, here are the steps.

1. On the "Obligation & Hours Worked" tab, set the Account Status filter to "* Active" (or whatever filters you want) and click Search.
2. Select all the accounts by clicking the check box next to "Account Name" or check just the boxes next to desired accounts to change.
3. Click Multi-Reset Balance.
4. Enter 0 in the Hours field and click Save Changes for ALL Accounts listed NOW, then OK. This will reset the Yearly Obligation, Worked, and Balance amounts all to 0 and create a new "Invoice Created" date in the "History" link of the Detail Transaction column. (Note: If the billing system is active, this action will only reset the balance to 0 and nothing else. It also will not create a new invoice created date; only the automated system will do that on the 1st of the chosen "First month of fiscal year.")
5. Select the same accounts again and click Multi-Reset Yearly Obligation. Enter the number of points/hours in the Hours field and click Save Changes for ALL Accounts listed NOW, then OK.

Q What if I want Accounts without Members to have obligations as well?

A Those Accounts with a red "No" in the "Non-Free Active Members" column will not automatically get a new Yearly Obligation; the number will reset to 0 in the first month of the fiscal year. However, if they have an obligation but do not meet it they will be billed like everyone else. So if you want them to have an obligation you will need to manually select those accounts and use the Multi-Reset Yearly Obligation button to manually set it.

Q Who can manage the SH system?

A A Super User admin or Service Hours Admin can manage the SH system.

Q How do I setup a Service Hours Admin to manage the SH system?

A
1. Go to Billing Admin > Service Hours Admin > Service Hours System Setup.
2. Scroll to the very bottom of the page.
3. Pick the Account to designate the Account to be a Service Hours Admin.

Q Does a Service Hours Admin need to be a Super User admin?

A No. A Service Hours Admin can be ANY admin level or even Not an Admin. A non-admin will not have access to any other area that only admins can reach.

Q Can each Account go in and look at their own service hours? Can they adjust them themselves?

A Yes, an individual can view their obligation and the up-to-date balance under My Account > $My Invoices/Payments > Service Hours. No, an individual CANNOT change either the yearly obligation nor post hours. Only a Super User or SH admin can perform these tasks