

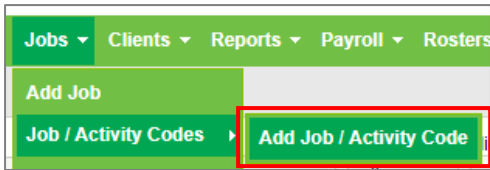
ACTIVITY CODES

Contents

Create an Activity Code.....	2
Edit an Activity Code	4
Deactivate an Activity Code	5
Reactivate an Activity Code	6
Delete an Activity Code.....	7
Code Type Guide	8

Create an Activity Code

1. Hover on *Jobs*, hover on *Job/Activity Codes*, and click on *Add Job/Activity Code*:



2. Enter a *Code*:

Edit Code

Code :

3. Enter a *Code Description*:

Code Description :

4. Select an *Activity GL Code* (if connected to Xero):

NB: This is for the expenses side

Activity GL Code -- select code --

5. Select a *Xero Account Code* (if connected to Xero):

NB: This is for the Income side

Xero Account Code -- select code --

6. Enter a *Rate Per Unit* (if applicable):

Rate Per Unit :

7. Enter a *Default Per Unit Quantity*, *Daily Hourly Bonus Threshold*, and/or *Bonus Rate Per Unit* (if applicable):

Default Unit Quantity :

Daily Hourly Bonus Threshold :

Bonus Rate Per Unit :

8. Enter a *Chargeout Rate* and/or *Custom Activity Hourly Rate* (if applicable):

Chargeout Rate :

Custom Activity Hourly Rate :

9. Select a *Code Type*:

NB: For the Code Type guide, please [click here](#)

Code Type :

10. Update the *Tax Rate* and/or *Remuneration Rate* (if applicable):

Tax Rate :	<input type="text" value="0.00"/>	%
Use Setup Rate? :	<input checked="" type="checkbox"/>	
Remuneration Rate :	<input type="text" value="1"/>	

11. Click *Save*:










Code :	<input type="text" value="Apple"/>	
Code Description :	<input type="text" value="Apple Picking"/>	
Activity GL Code :	-- select code --	
Xero Account Code :	-- select code --	
Rate Per Unit :	<input type="text" value="0.2250"/>	
Default Unit Quantity :	<input type="text"/>	
Daily Hourly Bonus Threshold :	<input type="text" value="0"/>	
Bonus Rate Per Unit :	<input type="text"/>	
Chargeout Rate :	<input type="text"/>	
Custom Activity Hourly Rate :	<input type="text"/>	
Code Type :	billable	
Tax Rate :	<input type="text" value="0.00"/>	%
Use Setup Rate? :	<input checked="" type="checkbox"/>	
Remuneration Rate :	<input type="text" value="1"/>	

Edit an Activity Code

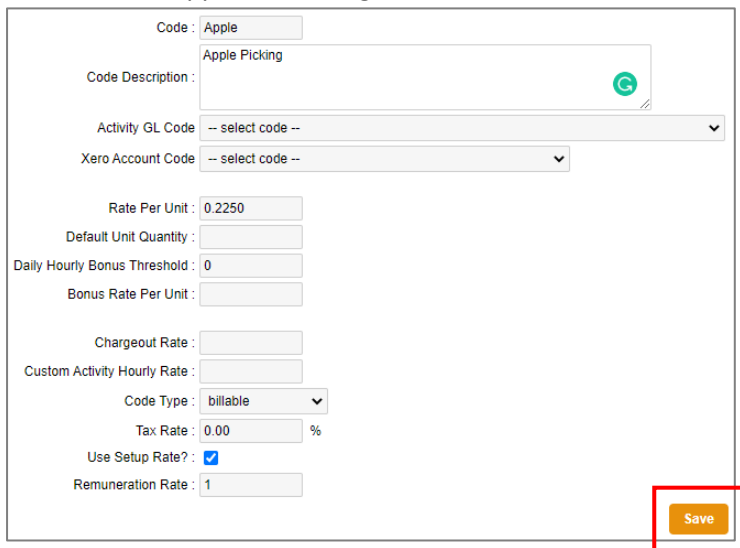
1. Hover on *Jobs* and click on *Job/Activity Codes*:



2. Click the edit icon in line with the Activity you want to edit:

Code	Description	Code Type	GL code	Rate Per Unit	Custom Hourly Rate	Tax Rate (%)			
Apple	Apple Picking	billable	478	0.2250		15.00*			
Fruit	Fruit Picking	billable	477			15.00*			
Grape Pruning	Grape Pruning	billable	479	1.6500	32.50	15.00*			

3. Make the applicable changes then click *Save*:



A screenshot of the 'Edit Activity Code' form. The form contains several fields and controls:

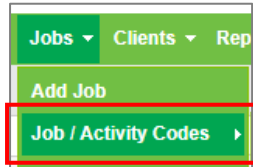
- Code: Apple
- Code Description: Apple Picking
- Activity GL Code: -- select code --
- Xero Account Code: -- select code --
- Rate Per Unit: 0.2250
- Default Unit Quantity: [empty]
- Daily Hourly Bonus Threshold: 0
- Bonus Rate Per Unit: [empty]
- Chargeout Rate: [empty]
- Custom Activity Hourly Rate: [empty]
- Code Type: billable
- Tax Rate: 0.00 %
- Use Setup Rate?
- Remuneration Rate: 1

The 'Save' button is highlighted with a red box.










Deactivate an Activity Code

This option will hide the Activity Code, but not delete it. This means you can reactivate the Activity Code at any point.

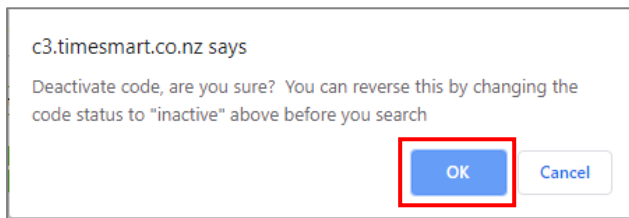
1. Hover on *Jobs* and click on *Job/Activity Codes*:



2. Click the deactivate icon in line with the Activity you want to deactivate:

Code	Description	Code Type	GL code	Rate Per Unit	Custom Hourly Rate	Tax Rate (%)			
Apple	Apple Picking	billable	478	0.2250		15.00*			
Fruit	Fruit Picking	billable	477			15.00*			
Grape Pruning	Grape Pruning	billable	479	1.6500	32.50	15.00*			

3. Click *OK*:

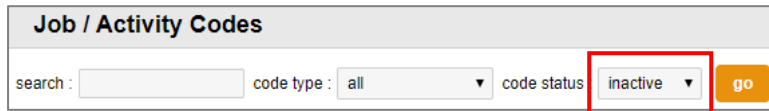


Reactivate an Activity Code

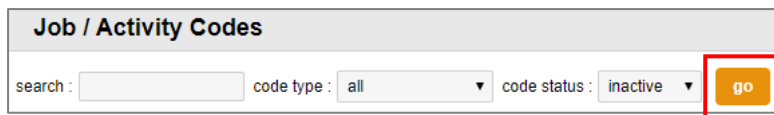
1. Hover on *Jobs* and click on *Job/Activity Codes*:



2. Change the *Code Status* to *Inactive*:



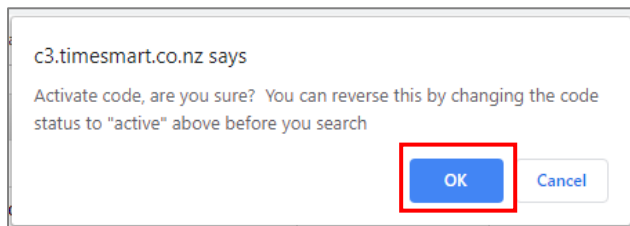
3. Click *GO*:



4. Click the activate icon in line with the Activity you want to activate:

Code	Description	Code Type	GL code	Rate Per Unit	Custom Hourly Rate	Tax Rate (%)			
Apple	Apple Picking	billable	478	0.2250		15.00*			
Grape Pruning	Grape Pruning	billable	479	1.6500	32.50	15.00*			

5. Click *OK*:












Delete an Activity Code

1. Hover on *Jobs* and click on *Job/Activity Codes*:



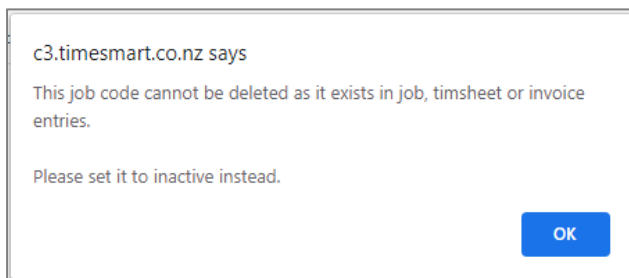
2. Click the delete icon in line with the Activity you want to delete:

Code	Description	Code Type	GL code	Rate Per Unit	Custom Hourly Rate	Tax Rate (%)			
Apple	Apple Picking	billable	478	0.2250		15.00*			
Fruit	Fruit Picking	billable	477			15.00*			
Grape Pruning	Grape Pruning	billable	479	1.6500	32.50	15.00*			

3. Click *OK*:



Note: If the Activity Code you wish to delete has been used in a Job, Timesheet, and/or Invoice, you will not be able to delete it:



Code Type Guide

Code Type	Description	Paid Time	Example
Job Cody Only	Attached to the Client/Block	No	Harvesting/Management/Packhouse
Billable	Used in conjunction with a Job (<i>Job Code Only</i>)	Yes	Picking/Pruning/Weeding
Paid Non-Billable	Used when a team member is getting paid, but they are not at work	Yes	Annual Leave/Sick Leave/Time in Lieu
Non-Billable	Internal cost – cannot be charged to a Job (<i>Job Code Only</i>)	Yes	General/Administration
Unpaid Time	Used for internal timesheet recording	No	Unpaid Leave/Rostered Time Off/ACC 2 nd Week