

SoloManage

SETTINGS GUIDE

2008

Settings guide

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SoloManage

SETTINGS GUIDE

INTRODUCTION

This guide will help you to configure SoloManage, using the Settings panel.

Before using this guide, it is recommended that you read the Installation and Quick start guide, which provides an introduction to the SoloManage software



SETTINGS

This settings panel is used to control how SoloManage operates, to provide diagnostic information, and to implement settings or information which is specific to your business.

Using the settings panel should be an infrequent event, and in most cases can simply be done as part of the initial installation. Only users with administrator access may use the settings panel.

There are seven main tabs in the settings panel most of which do not require any action:

Configurable:

- ▣ [Business settings](#)
- ▣ [Business rates](#)
- ▣ [System settings](#)

Not configurable:

- ▣ [System software](#)
- ▣ [User software](#)
- ▣ [Support](#)
- ▣ [About](#)

To access the settings panel, login as an administrator, and then click “Settings” in the left navigation menu.

Business settings

Click the business settings tab to see the configurable details:

- ▣ [Business contact details](#)
- ▣ [Workings time](#)
- ▣ [Working days](#)
- ▣ [Currency and country settings](#)
- ▣ [Sales tax](#)
- ▣ [Invoicing](#)

A typical business settings tab looks like this:

Business settings | Business rates | System settings | System software | User software | Support | About

Business contact details:

Business name	<input type="text" value="ABC Company"/>	Telephone	<input type="text" value="0124 581 6565"/>
Business address:	<input type="text" value="123 Any Street"/>	Fax	<input type="text" value="0457 9808 8000"/>
	<input type="text" value="Middle Town"/>	Email	<input type="text" value="info@ourcompany.com"/>
	<input type="text"/>	Web site	<input type="text" value="http://www.ourcompany.org"/>
	<input type="text"/>		
Postal code	<input type="text" value="ABC 123"/>		
Country	<input type="text" value="United Kingdom"/>		

Working time:

Record and bill time in	<input type="text" value="Hours"/>	Working days begin at:	<input type="text" value="09:00"/>
Increase to rates for overtime:	<input type="text" value="20"/> %	Working days end at:	<input type="text" value="17:00"/>
Default timesheet period:	<input type="text" value="Month"/>	Billable hours per day:	<input type="text" value="8.0"/>
		Use person rate as default:	<input type="checkbox"/>

Working days:

Mon Tue Wed Thu Fri Sat Sun

Currency and country settings:

Currency symbol	<input type="text" value="£"/>	Currency code	<input type="text" value="GBP"/>	Description	<input type="text" value="pounds"/>
Choose a country:	<input type="text" value="English (United Kingdom)"/>				


Sales tax:

Business tax id.	<input type="text"/>	Tax id. description	<input type="text" value="VAT registration number"/>		
Local tax description	<input type="text"/>	Local tax rate	<input type="text" value="0.00"/> %	Use Local tax	<input type="checkbox"/>
Regional tax description	<input type="text"/>	Regional tax rate	<input type="text" value="0.00"/> %	Use Regional tax	<input type="checkbox"/>
National tax description	<input type="text" value="VAT"/>	National tax rate	<input type="text" value="17.50"/> %	Use National tax	<input checked="" type="checkbox"/>

Invoicing:

Begin invoice numbering from	<input type="text" value="1"/>
Invoice header text	<input type="text"/>
Invoice footer text	<input type="text"/>
Accounting periods begin	<input type="text" value="01/01/2008"/>
Users can bill own projects	<input checked="" type="checkbox"/>

Remember to lick Update after you have entered settings data.



The purpose of most of the sections in business settings is self-describing. Some detailed points to consider are:

1. Business contact details – the name, address, postal code and country details entered here appear in the “From” section of invoices
2. Working time – the increase to rates for overtime setting causes cost booked to projects to be increased by this percentage where a user has marked a timesheet entry as overtime
3. The default time sheet period controls the period of time presented to users when they complete timesheets.
4. The working days begin and end time settings, in conjunction with the working days settings are used in the calculations of time utilisation on the dashboard, and in time sheet statistics. The billable hours per day entry is calculated automatically when the start or end time entries are altered, but may be overridden to any other value. The user person rate as default setting alters the behaviour of time sheet costs. If this setting is checked, whenever a timesheet entry is made, the cost of the time booked will be calculated using the default billing ate of the person making the entry (set in the Users section). If the setting is not checked, the cost will be calculated using the rate set for the task, regardless of the person making the entry.
5. Currency and country settings control the currency symbol and numerical formats used throughout SoloManage. This version of SoloManage includes settings for six major English-speaking regions, Choose your country or region from the list and the remaining related entries will be automatically altered, or can be overridden. This setting group allows a server-based installation of SoloManage to be based in one territory, but configured for users in a different region.
6. Sales tax settings allow for up to three separate types of sales tax to be added to invoices. In many cases, there will be only one tax category. The default installation of SoloManage has typical entries for VAT as a national tax, with VAT as the description and 17.5% as the standard rate. The business tax id box is used to contain the business VAT number of equivalent tax identifier. To use a tax entry on an invoice, the “Use tax rate” box at the right of each entry must be checked.
7. The invoicing section contains entries for header and footer text which will appear on invoices. This text could be used to contain messages such as the standard payment terms for your business. This section also controls the start date for your accounting periods. This setting affects the periods included in the time and profit charts and tables on the dashboard. The begin invoice numbering from setting allows you to choose a starting number other than one, in cases where you may wish to continue the invoice numbering sequence from a different invoicing package. The user can bill own projects setting determines whether only administrators may bill projects for the team.

Business rates

SoloManage is installed with a single default task rate, which will be used as the billing rate for every task, unless you choose to alter the default settings. The initial value of the default rate is one currency unit per hour. It is highly unlikely that the initial rate will be one which you will use, so you should choose a value for the initial rate which is appropriate for you. If you prefer to bill time at a rate per person, instead of at a rate per task, that setting can be selected in the business settings tab.

Altering billing rates and default settings usually needs to be done only during initial setup, or at infrequent intervals after that.

Click the Business rates tab to alter the default rate, or add new rates:

The screenshot displays the 'Business rates' tab in the SoloManage application. At the top, there are navigation tabs: Business settings, Business rates, System settings, System software, User software, Support, and About. Below the tabs is a search bar labeled 'Search rates:'. A table lists the current rates:

Description	Value	Unit	Billable	Status	Default
Default rate	£1.00	hour	Y	active	Y

Below the table are navigation buttons (back, forward, first, last) and a 'New rate' button. The page indicates 'Page 1 of 1 (1 rates)' and 'Search on key press' is checked. A dropdown menu for 'Show rate types' is set to 'all'. The 'Edit rate details' form is shown below, with the following fields:

- Rate id: 0
- Description: [text input]
- Value (£): 0.00
- Unit: hour
- Billable: Y
- Status: active
- Default rate for new client tasks

The 'Update' and 'Delete' buttons are located at the top right of the form.

Edit the default rate, and then click Update. Any single rate may be designated as the default rate. New tasks will now have the default rate you created as their billing rate.

Use Business rates to also create more billable rates, or non-billable rates to be used in timesheets, such as research, or office overheads.



System settings

The System settings tab contains entries which control how the configurable aspects of the software behave, including:

- Automatically checking for updates to the software
- Controlling the size of the log file
- Setting the number of items per page in grids used for data display
- Entering settings for any proxy or mail servers used on your network, if you have one.

Click the system settings tab to see the main entries:

Business settings	Business rates	System settings	System software	User software	Support	About
Check for updates when starting	<input checked="" type="checkbox"/>					
Check for updates every	7 days	▼				
Truncate log when larger than	1 MB	▼				
Grid page size	20 items	▼				
Use a proxy server	<input checked="" type="checkbox"/>					
Proxy server	YOURSERVERNAME					
Proxy port	yourportnumber					
Proxy username	your.username					
Proxy password	*****					
Mail server	localhost					
Mail server port	25					
Mail server username	your.username					
Mail server password	*****					
	<input type="button" value="Update"/>					

Using the proxy server settings may not be necessary for your computer. If you are unsure, contact your network Administrator.

Information tabs

The System software and User software tabs in Settings do not contain any configurable settings, and are used to provide diagnostic or troubleshooting data for administrators.

Typical tabs for these two sections are shown below.

Business settings	Business rates	System settings	System software	User software	Support	About
Server type	<input type="text" value="Microsoft-IIS/5.1"/>					
CLR runtime	<input type="text" value="2.0.50727.832"/>					
Server operating system	<input type="text" value="Microsoft Windows NT 5.1.2600 Service Pack 2"/>					
SQLExpress	<input type="text" value="Installed"/>					
SQL Version	<input type="text" value="SQL Server 9.00.3042.00 - SP2 (Express Edition with Advanced)"/>					

Business settings	Business rates	System settings	System software	User software	Support	About
Operating system	<input type="text" value="Win32"/>					
.Net Framework 2 installed	<input type="text" value="Installed"/>					
Browser	<input type="text" value="Microsoft Internet Explorer"/>					
Browser version	<input type="text" value="Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1; SV1; .NET CLR 1.1.4322; .NET CLR 2.0.50727; InfoPath.2; .NET CLR"/>					
Process running in domain	<input type="text" value="DELLXPS"/>					
Process running as user	<input type="text" value="ASPNET"/>					
User name	<input type="text" value="administrator"/>					
Authentication type	<input type="text" value="Forms"/>					
Authenticated	<input type="text" value="True"/>					
Impersonation level	<input type="text" value="None"/>					
Anonymous	<input type="text" value="False"/>					



Support tabs

The Support and About tabs provide links to help or information about SoloManage.

The support tab also includes a link to a page which allows your software to send an automatic message and log file to the SoloManage.com support system:

Business settings	Business rates	System settings	System software	User software	Support	About
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Support for SoloManage can be obtained by visiting www.SoloManage.com/support/index.php

User guides are available at www.SoloManage.com/documentation.htm

To send an error log to SoloManage support, click [here](#)

Details of your current licence are displayed in the support tab. This tab also checks the SoloManage.com site automatically, to see if you have the latest version of the software installed:

Business settings	Business rates	System settings	System software	User software	Support	About
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Licensed to	<input type="text"/>
Licence expires	<input type="text"/>
Licence type	Unlimited user
Maximum number of users	<input type="text"/>
Created number of users	0
Installed version	1.0.2515.1
Latest version	1.0.2515.1

You have the latest version installed