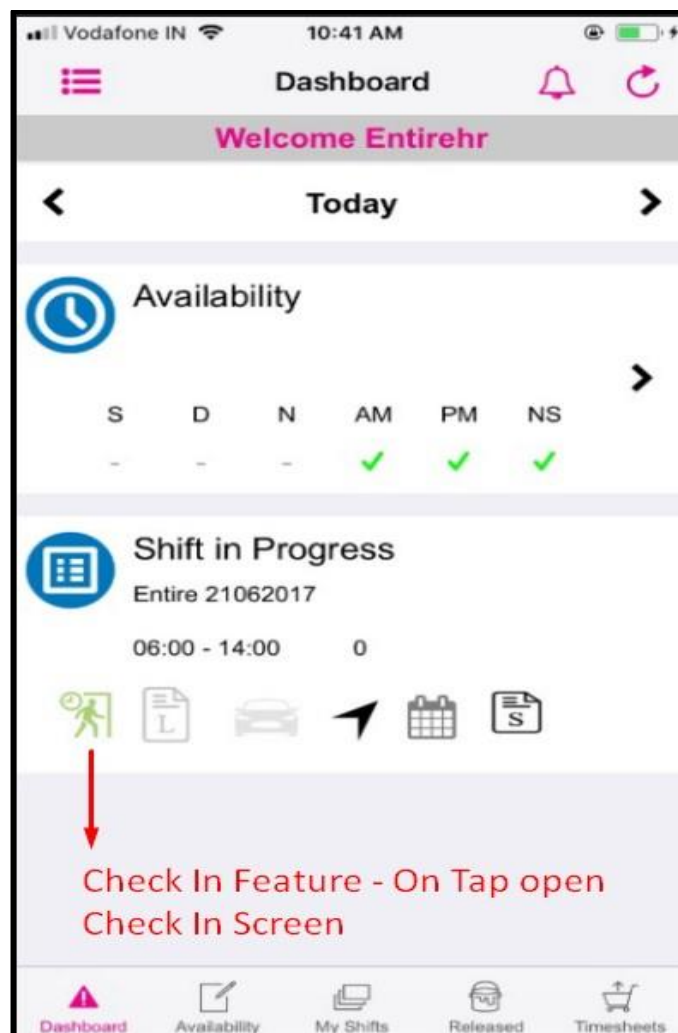# EntireHR Members App Check-In / Check-Out Help Manual
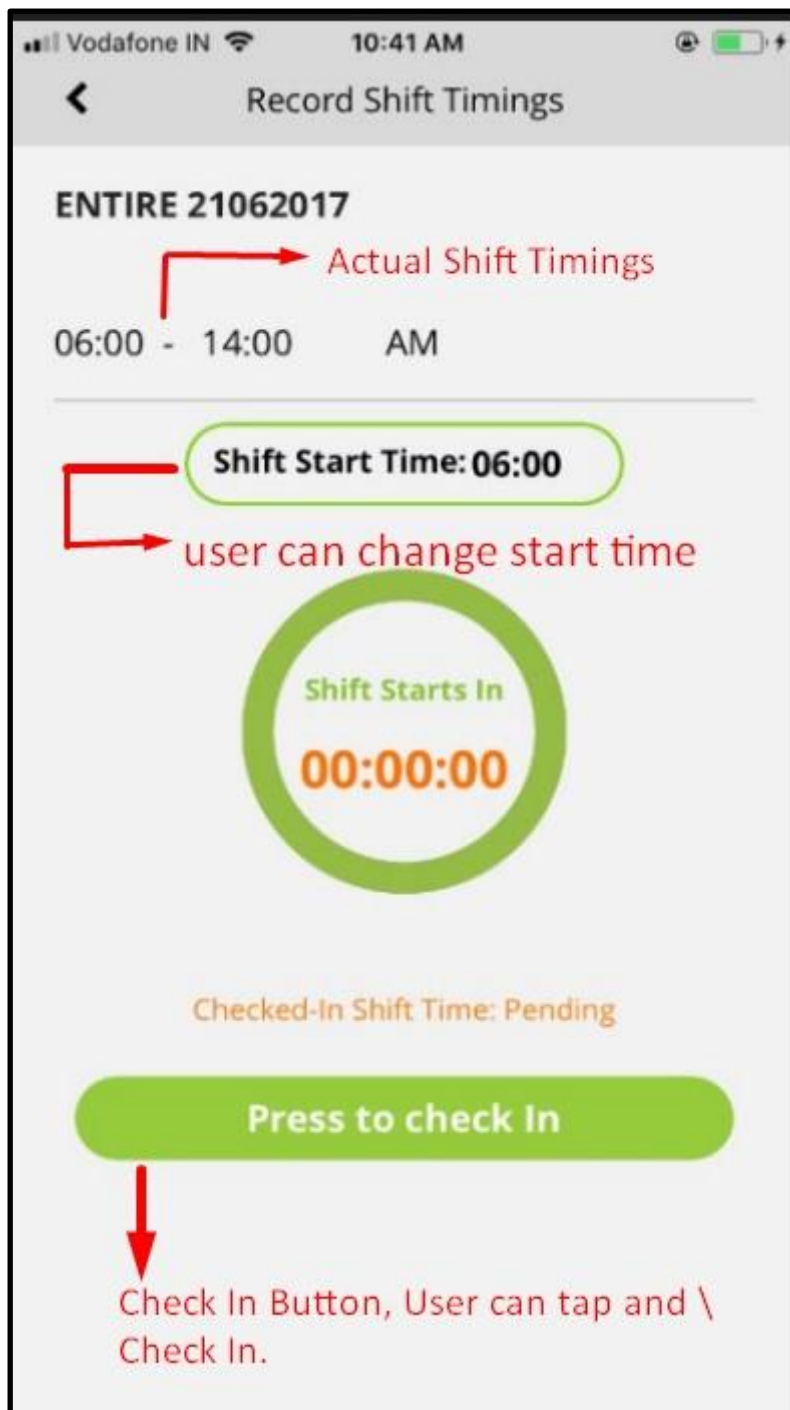
Users will be able to perform **Check-In**/**Check-out** for Shifts from their Members App. Users can use this feature only for **booked shifts**. Whenever shift status is booked then Check-In feature will be available for user. **Check-In** feature is flag based and only available when it is sets true in company registration table. If flag is false then there will be no **Check-In** option for user in app. User can simply view shift details in app. Check-In allows to enter Check-In time as per user's **Check-In** time. Actual **Check-In** time is also recorded by the app.

Check-In / Check-out notification sets for user as per the time set in database. If notification time sets 60 minutes then user will receive Check-In notification accordingly from **Shift Start Time**.

**Mobile App Dashboard screen shot showing Check-In Option**

- To **Check-In** user has to press on **Check-In** button, Before **Check-In** user can change start time as per his **Check-In** time for shift. On success timer will start and run as per current time and actual end time of shift. It will show the remaining time. Looks very informative screen for user.

- When user tap on **Check-In** button it records actual **Check-In** time. User cannot change that time but they can change start time as per their starting time. Time when user is starting his shift, User can select and **Check-In**.

- As per the selected start time **Check-In** button will be shown on screen. If Start Time is less than current time then **Check-In** button will be shown on screen. If Selected Start time is greater than current time then **Check-In** button will be shown when selected start time gets equal to current time.

- User can enter **Shift Start** and **Shift End** time. Like user can change **Shift Start** and **End Time** on timesheet screen. Basically this flexibility allows user to enter their shift start and end timings if they are coming late/early or leaving late/early from their shift.

- Check-out allows app to record actual **Shift Check-out** time.

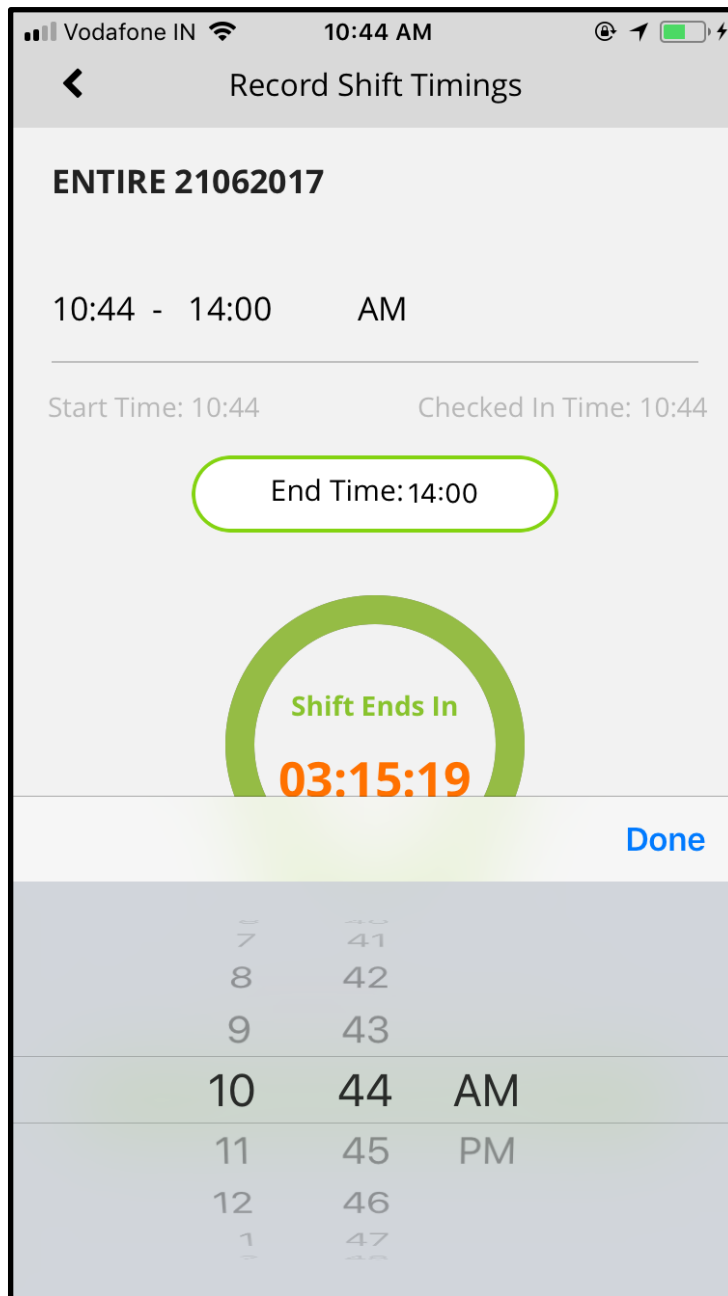**Mobile App Dashboard screen shot showing Check-Out Option**
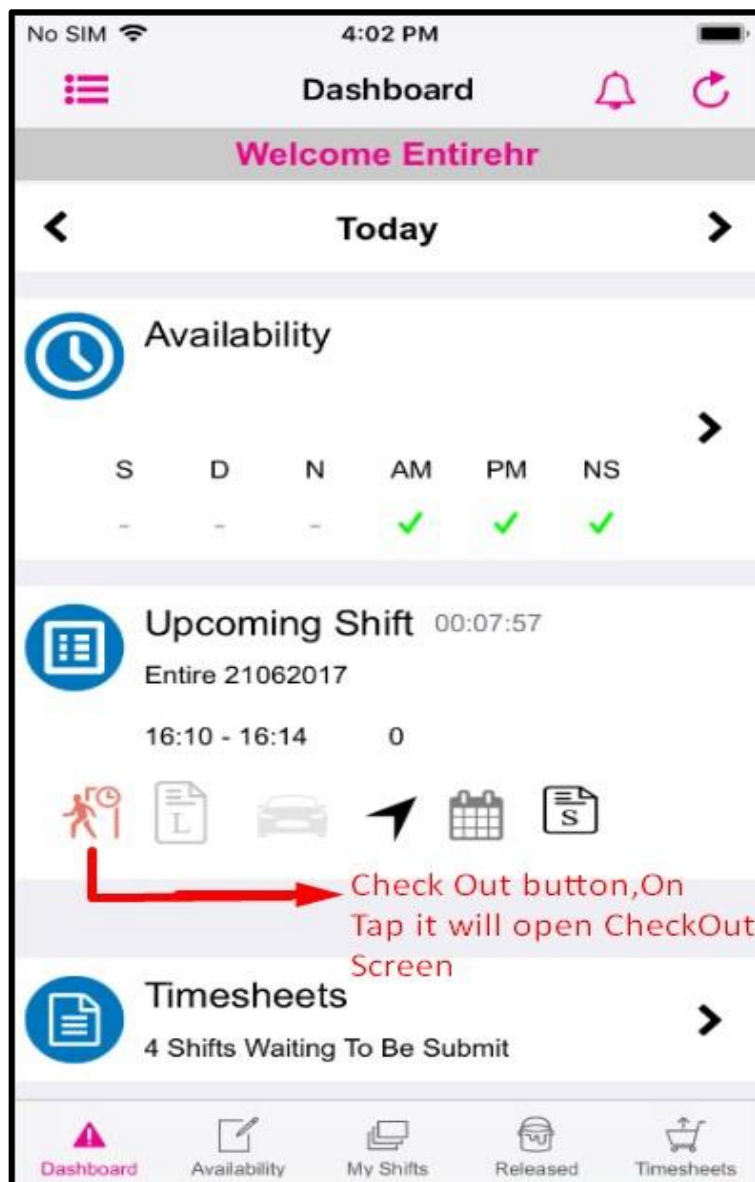
On Check-Out icon tap, Below Screen allows user Check-Out (Screen 1)
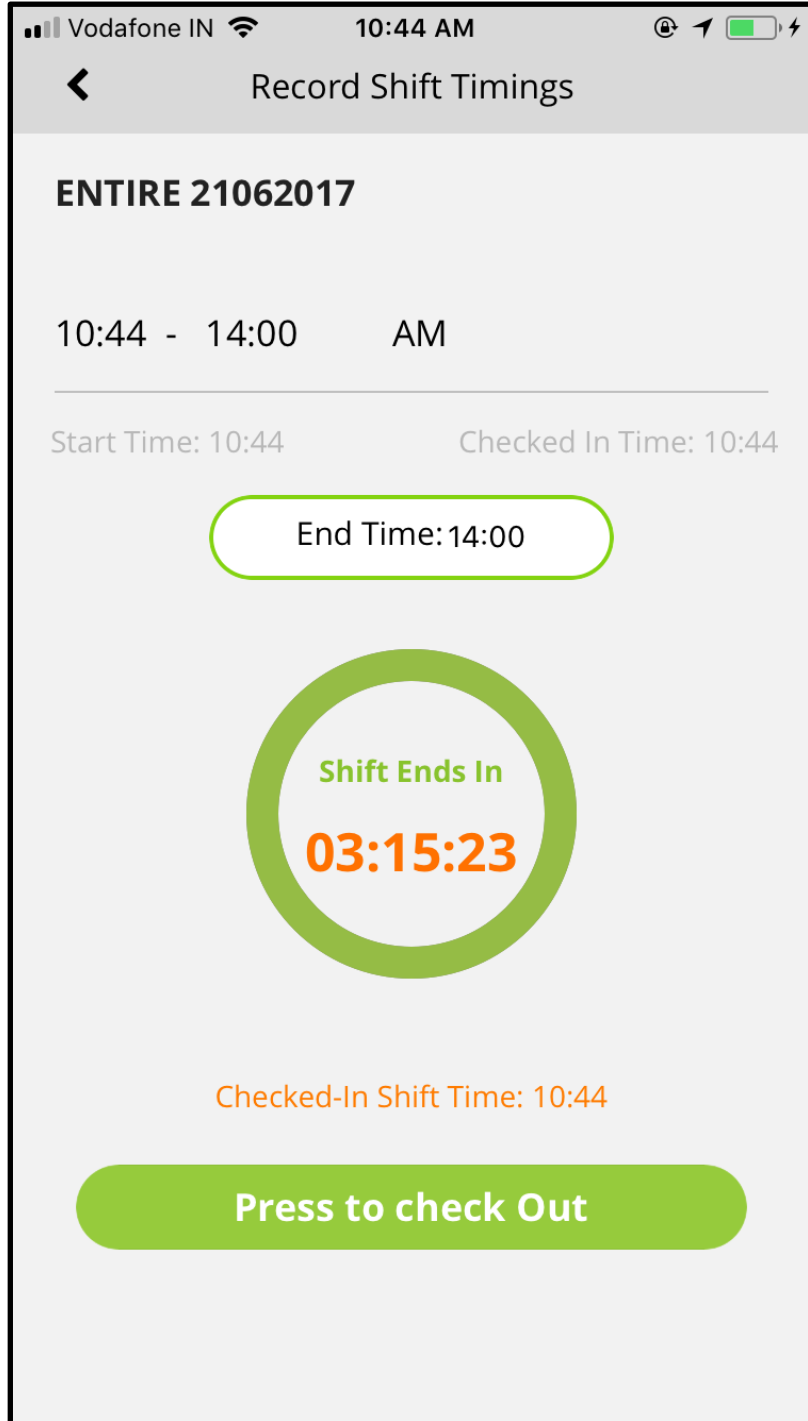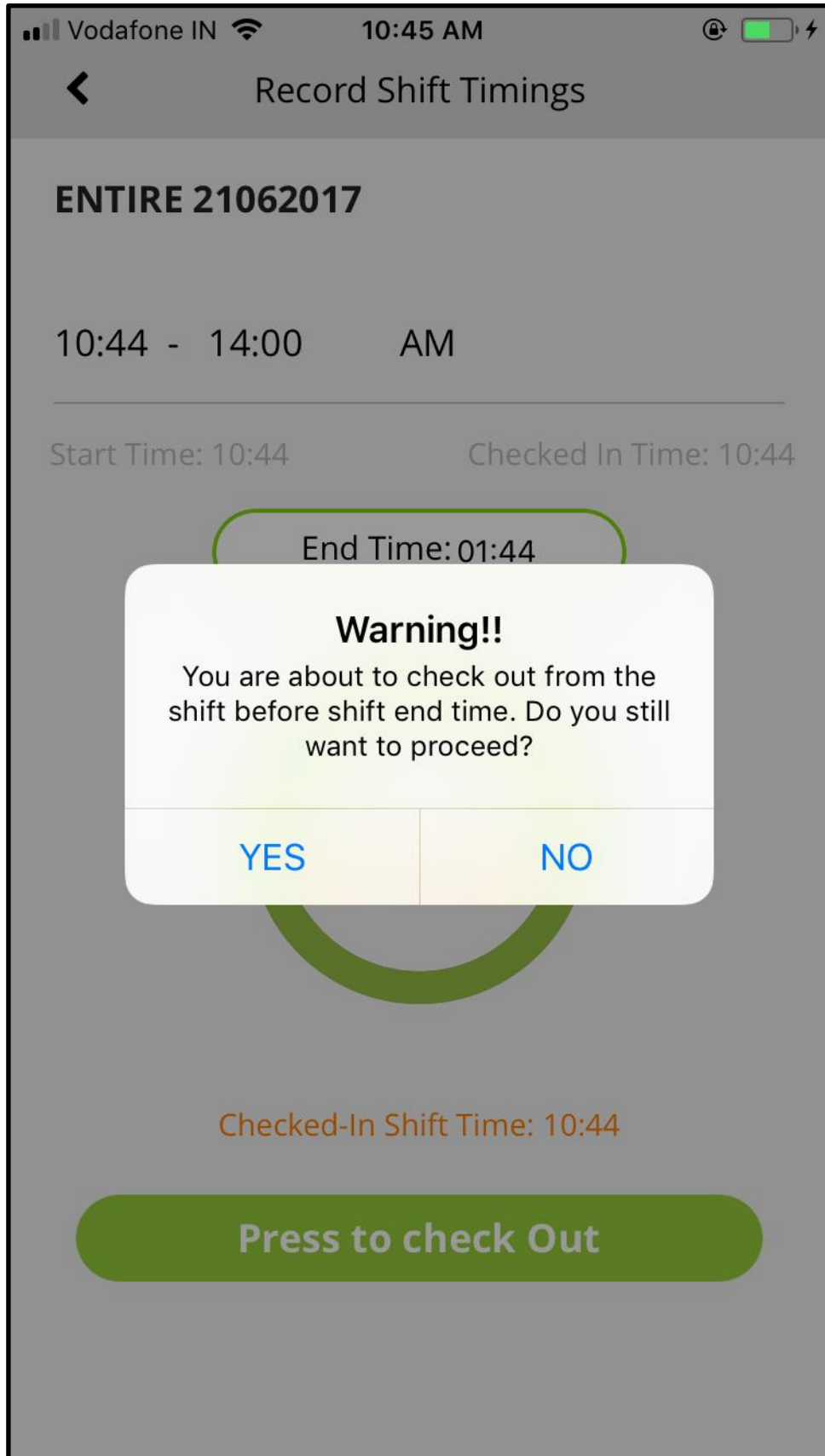

- If user **Checked In** then user will receive **Check-out** notification at **Shift End** time.

- User can **Check-out** early (before shift actual end time) and submit timesheets.
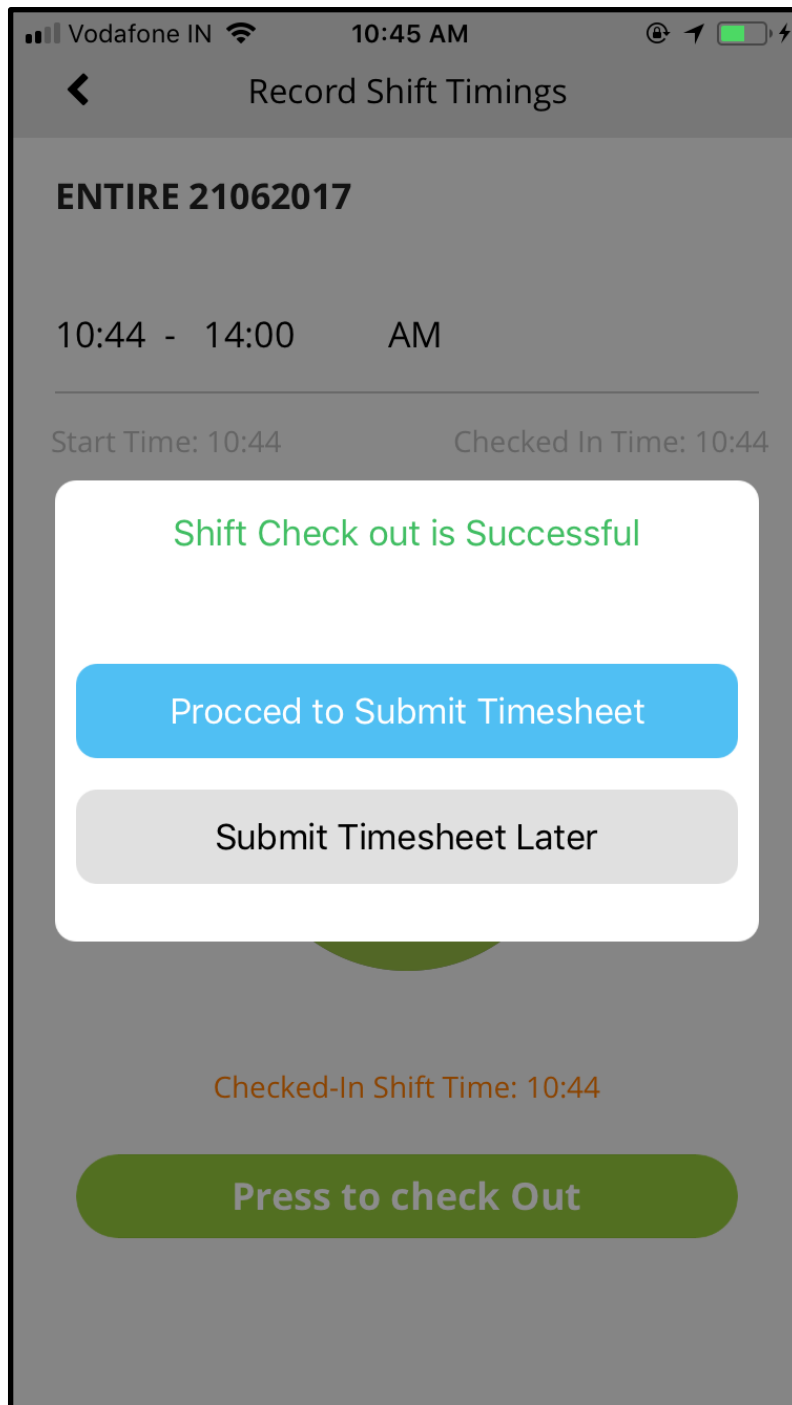
- When user tap on **Check-out** button it records actual **Check-out** time. User cannot change that time but they can change **End Time** as per their ending time. Time when user is leaving from shift, User can select and **Check-out** from shift.

- If user Check-out time is before **Shift End Time** then user will get one pop up to notify user that he is checking out from shift before **Shift End Time** with yes/no options. Tapping on yes will result in successfully Check-out and provide two options to user **Submit Timesheet Now** and **Submit Timesheet Later.**

ENTIRE
SOFTWARE

📶 Vodafone IN 🛜   10:45 AM   🔒 🔋 ⚡

<   **Record Shift Timings**

ENTIRE 21062017

10:44 - 14:00   AM

Start Time: 10:44   Checked In Time: 10:44

End Time: 01:44

Warning!!

You are about to check out from the shift before shift end time. Do you still want to proceed?

YES	NO

Checked-In Shift Time: 10:44
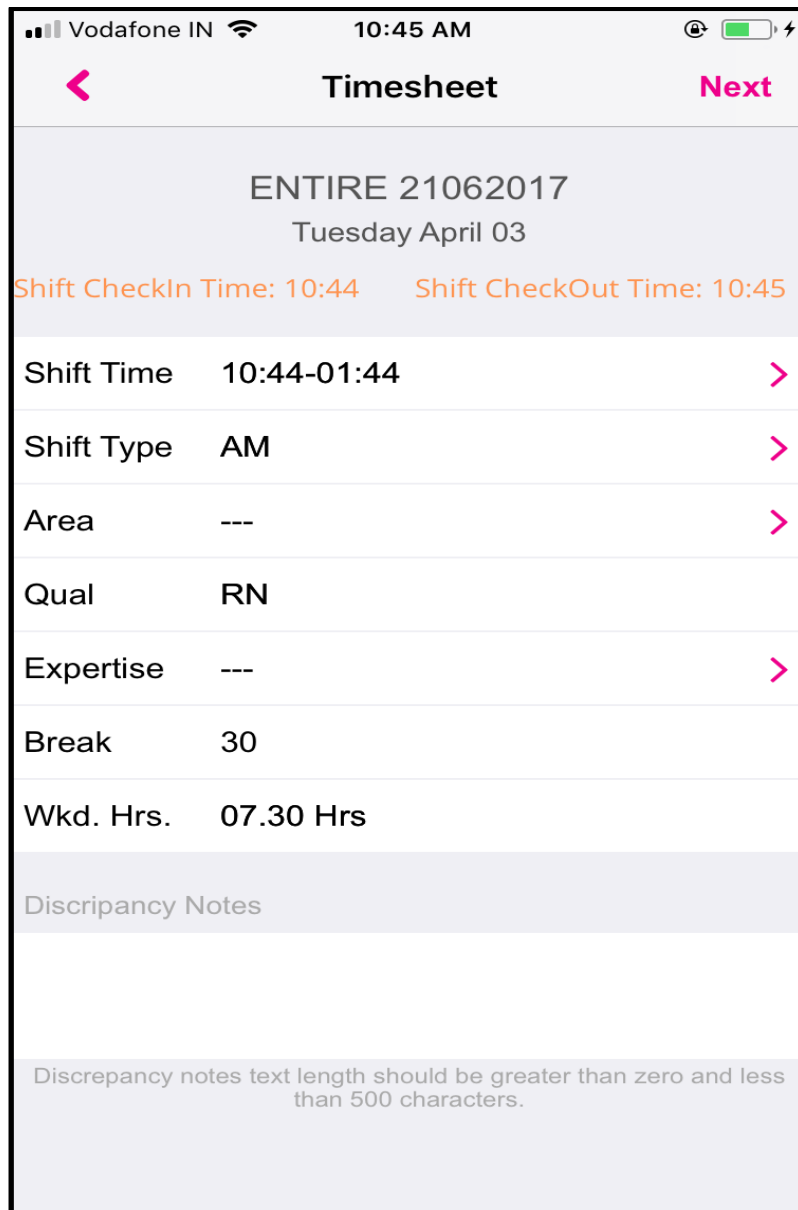
Press to check Out

Check-out Screen - 5

- **Submit Timesheet Later** option will take user to dashboard with Shift in Progress Label as user **Checked Out** before shift end time but timesheet is not submitted so timesheet icon will appear on shift ans user can again go for submit timesheet now option on **Check-In** Screen or same shift will appear on timesheet screen.

ENTIRE 21062017

Tuesday April 03

Shift CheckIn Time: 10:44   Shift CheckOut Time: 10:45

Shift Time	10:44-01:44	>
Shift Type	AM	>
Area	---	>
Qual	RN	
Expertise	---	>
Break	30	
Wkd. Hrs.	07.30 Hrs	

Discripancy Notes

Discrepancy notes text length should be greater than zero and less than 500 characters.

- **Submit Timesheet Now** will take user to timesheet detail screen with prefilled **(Selected Start/End Time)** details with **Checked In** and **Checked Out** timestamp details.

- As user checked out early (before shift end time) then also user can submit timesheet.

- **Check-In/Check-out feature allows** user to submit their timesheets early, they do not have to wait till shift actual end time. User can **Check-In** and **Check-out** early and proceed to submit timesheet.

- If **Check-In/Check-out** is not done by user then **Check-In** and **Check-out** time will be timesheet submission time.

- If **Check-In** is done but **Check-out** is not done by user and shift is ended then in timesheet listing shift will appear with red Check-out icon and **Check-out** time will be timesheet submission time.

- If shift **Check-In/Check-out** done then it will start appearing in timesheet section.

Check-In / Check-out integration with Timesheet submission

Now timesheet section will show timesheets for whom **Check-In / Check-out** is done but shift actual time is not ended including the timesheets for past shifts. We have enhanced timesheet slightly for users and to give them **flexibility** to submit timesheet **early, before shift end time**.

Timesheet Detail Screen 1
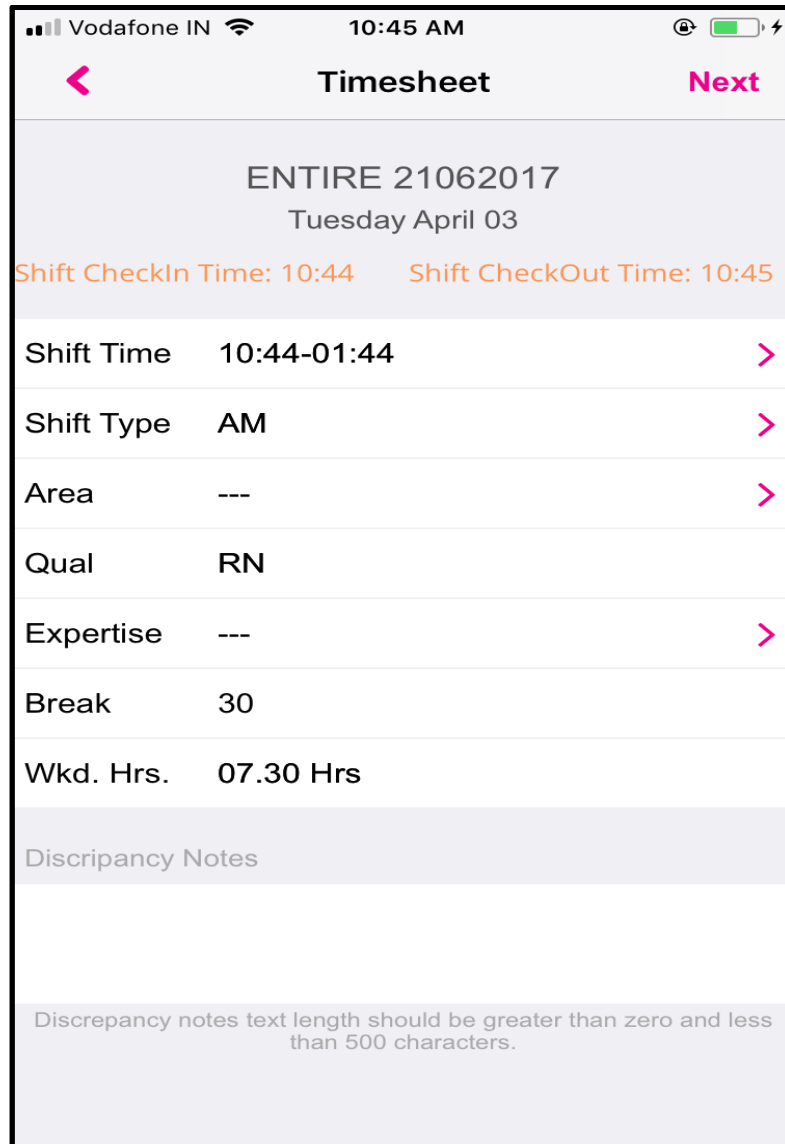
- If **Check-In** flag is false and shift time is ended then it will appear in timesheet tab. Like it used to appear after **Shift End Time**.

- If **Check-In** flag is true then timesheet tab contains past time sheets and in-progress shift timesheets if **Check-In** and **Check-out** is done for the shift. This feature allows user to **Submit Timesheet** before shift end time if Check-In and Check-out is done for the shift.
- Also **Check-In** and **Check-out** date time stamp will appear on **Timesheet** detail screen.
- If **Check-In** is done and **Check-out** is not done also shift is ended then it will appear in **Timesheet Tab** with red **Check-out** icon.
- If **Check-In** done & **Check-out** is done before shift actual end time, Also user submitted **Timesheet** then it will not appear in timesheet listing and not on dashboard.
- If **Check-In** is done and **Check-out** is done before shift actual end time then timesheet will appear in listing.

EntireHR Staff App Check-In / Check-Out Help Manual

Introduced **Check-In/Check-out** feature for staff app users with contact log integration. This feature is only available to "entireHR Subscription purchased with additional plug-in CRM Contact log" as the entire process is seamlessly creating logs on every user action.

Staff App user can **Check-In** for selected client and **Check-Out**. At the time of **Check-In** and **Check-Out** we have implemented Date/Time stamp, GPS Location, Username and Contact method log. It helps in tracking all staff app user activities while using the app from Web Staff Portal. Recording user activity is important from log point of view.

- To use Check-In feature it is important to add **CHECK-IN** contact method in master.
- **Check-In** and **Check-out** feature is flag based and only enable when **create_log flag** is true. It means **contact log (CRM)** feature is enable for client.
- **Check-In** feature implemented for selected client. User device location is mandatory for **Check-In**. Fo**r Check-In** contact method should be available in **Contact Method** master. Else user will get the error pop up to add contact method in master.
- At the time of **Check-In** user's **current location, date/time and logged in user details** recorded on **Contact Log (CRM)**.

## Check-In Screen (Contact Log is true)
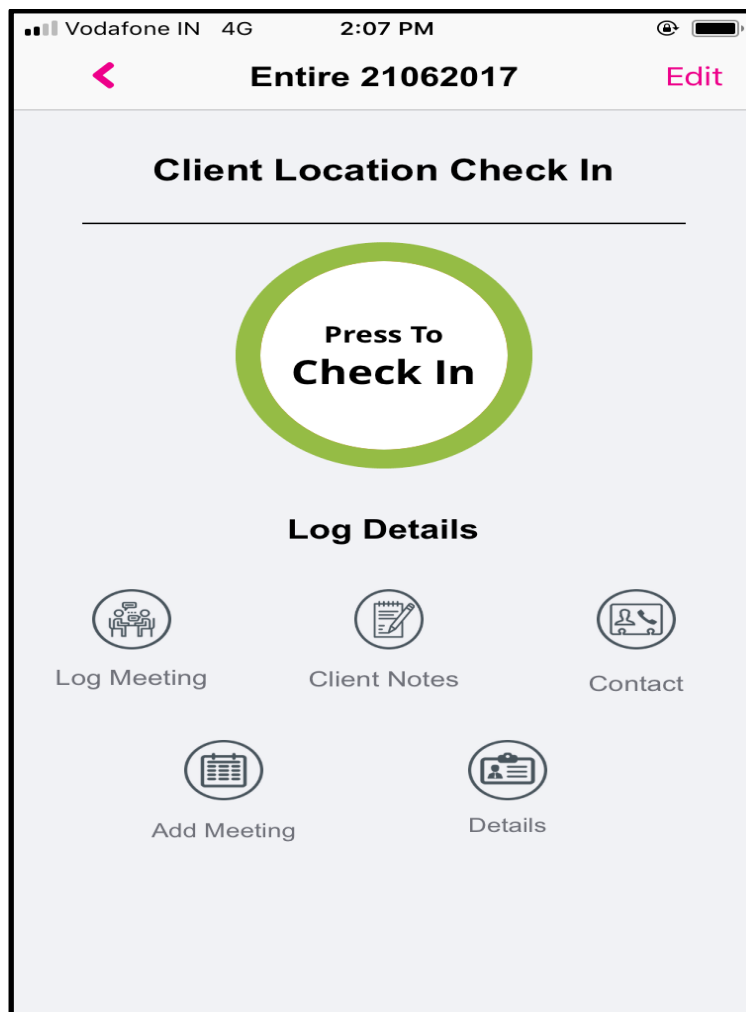
- To use Check-out feature it is important to add **CHECK-OUT** contact method in master.
- Check-out feature implemented for selected client. User device location is mandatory for **Check-out**. For **Check-out** contact method should be available in Contact Method master.

Check-out Screen
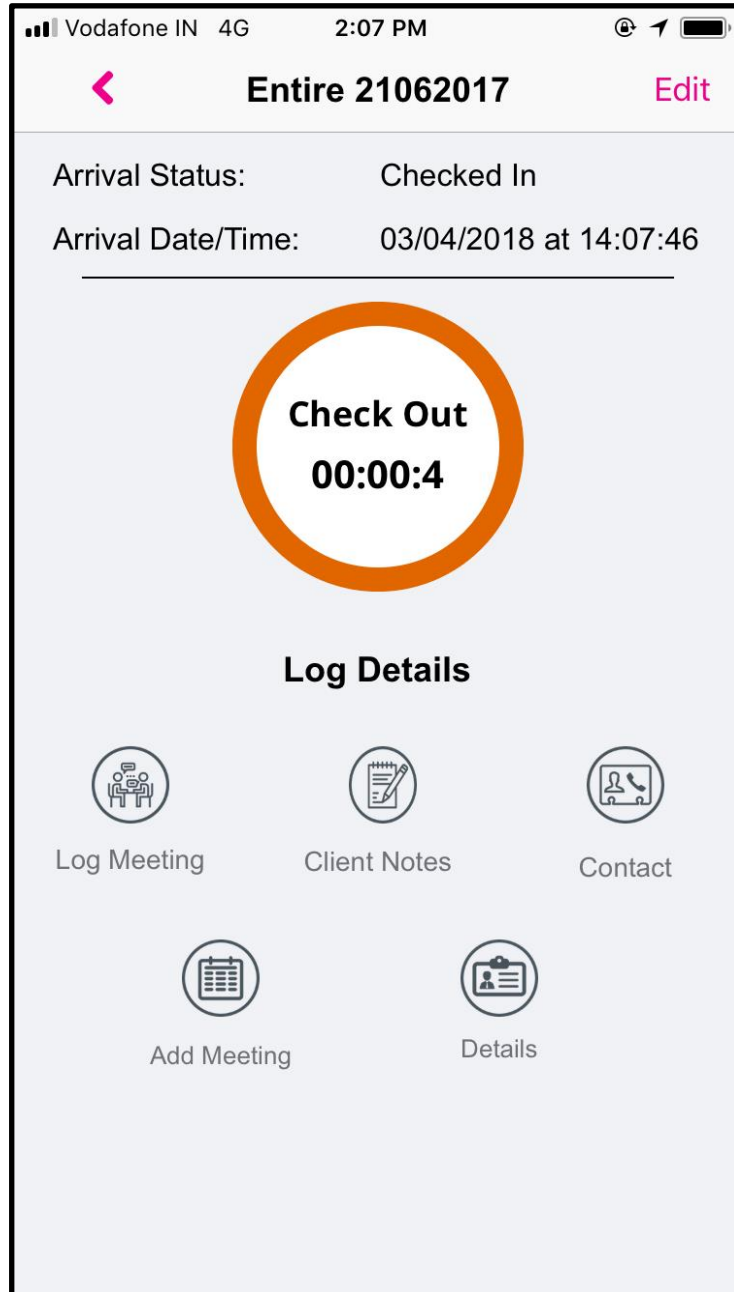
- When user **Checked In**, **Check-In** button change to **Check-out** button and timer starts running on device.
- At the time of **Check-out** user's **current location, date/time and logged in user details** recorded on CRM.
- On web staff user can check created **contact log** for the client.
- User cannot leave the screen without performing **Check-out.**
- User has to **Check-out** or kill app to leave form **Check-out** Screen.
- At a time user can **Check-In** for single client.

Log Meeting Feature Button On Check-In Screen
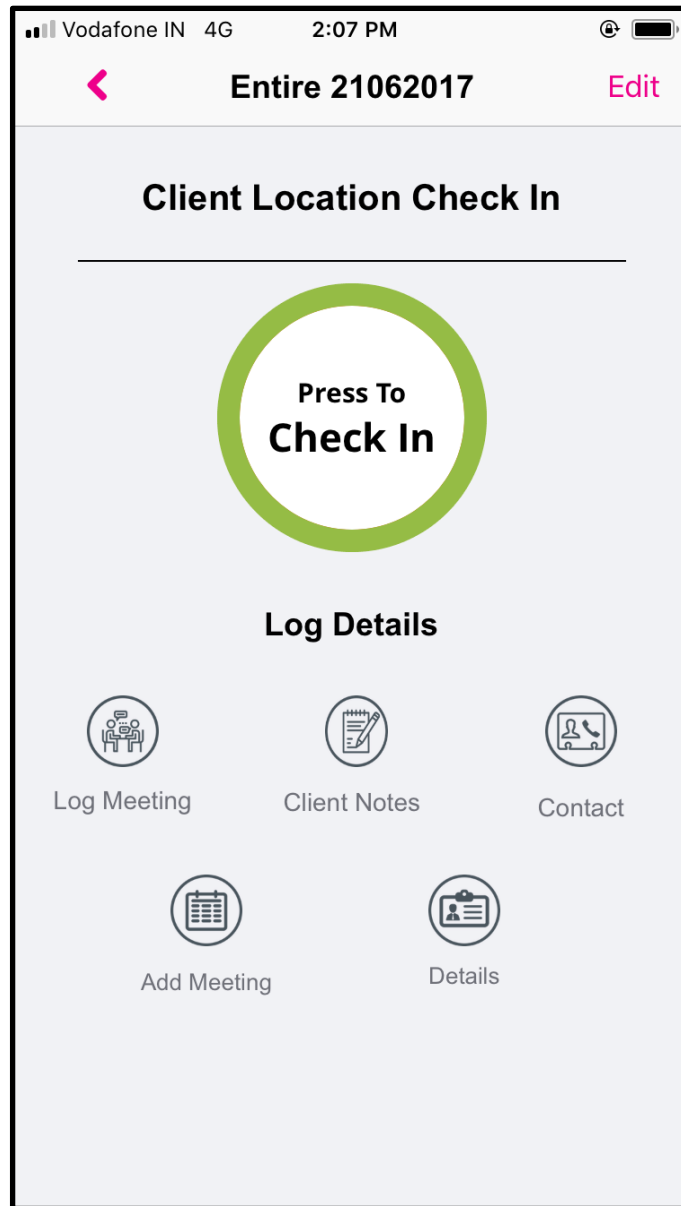
Log Meeting Screen 2

❮   **Entire 21062017**   Save

Record Current Meeting Detail

Arrival Status   Checked In

Arrival Date/Time   03/04/2018 at 14:08:12

Contact Name *
Contact Name *

Contact Designation *
Contact Designation *

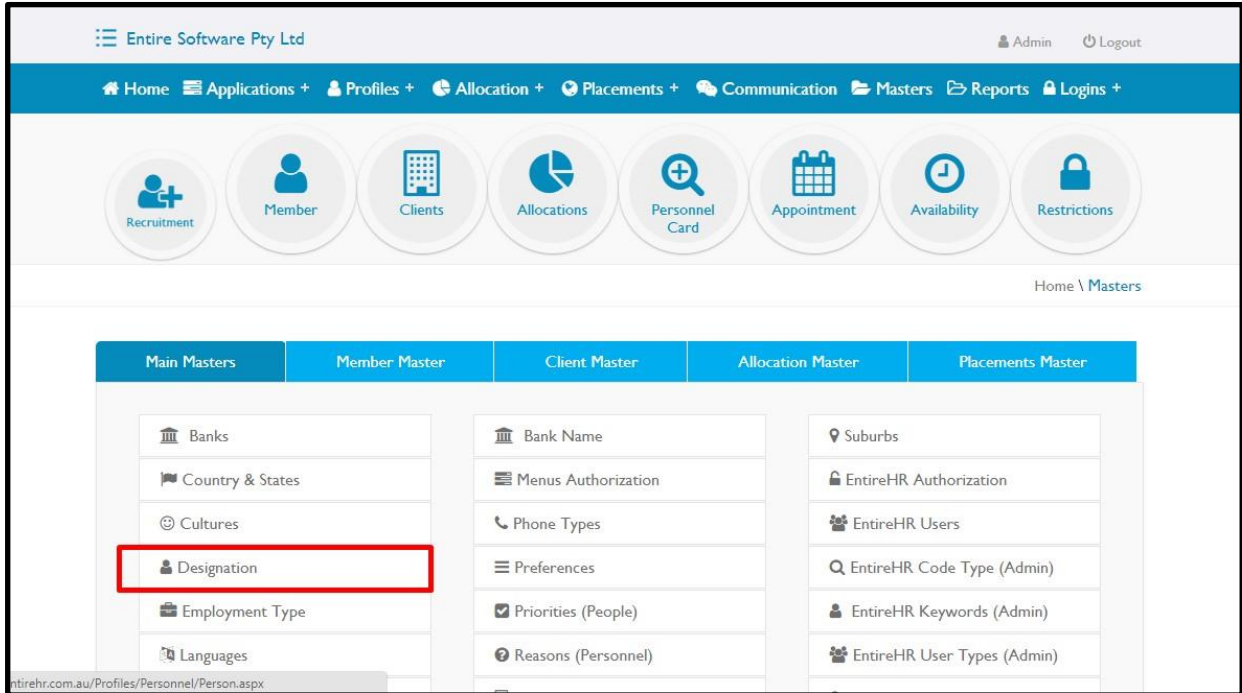Contact Method *
Contact Method *

Contact Reason *
Contact Reason *
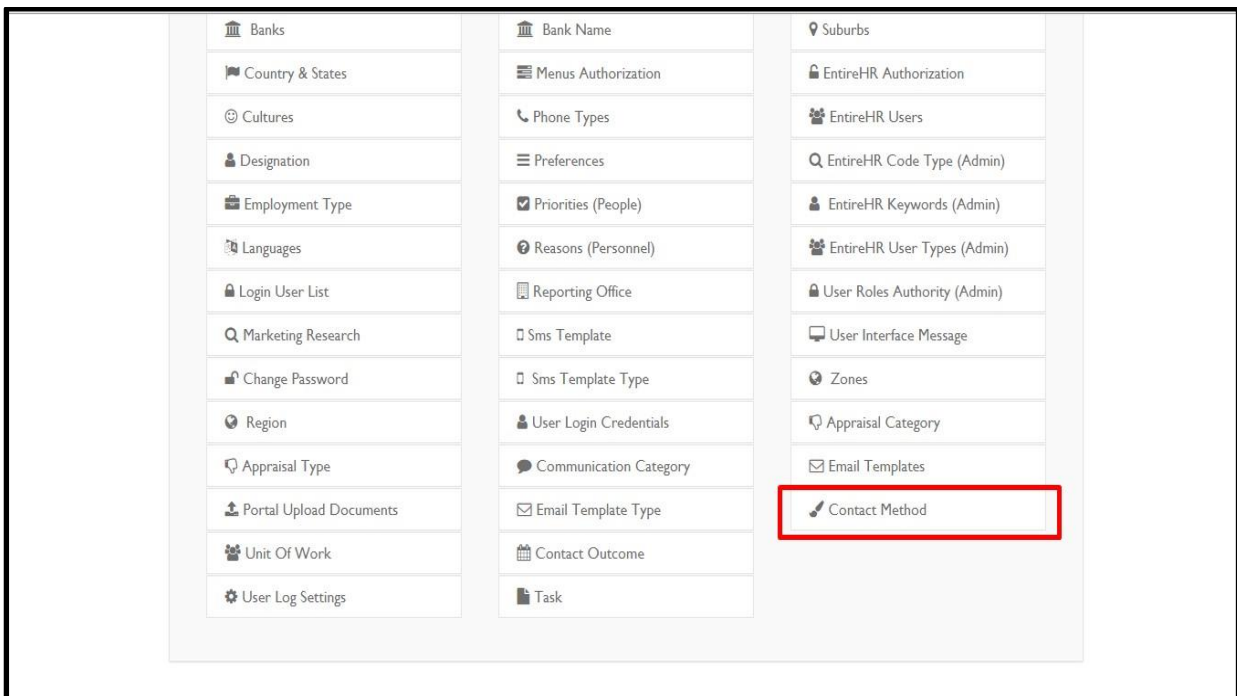
Meeting Outcome *
Meeting Outcome *

Task Performed
Task Performed

- All fields are mandatory to Log Meeting details Except Task.
- **Contact Name** is a drop down field contains list of all professional attached to selected client.

- **Contact Designation** is also a dropdown field and contains list of all designation added in Designation master. See the attached image for reference.
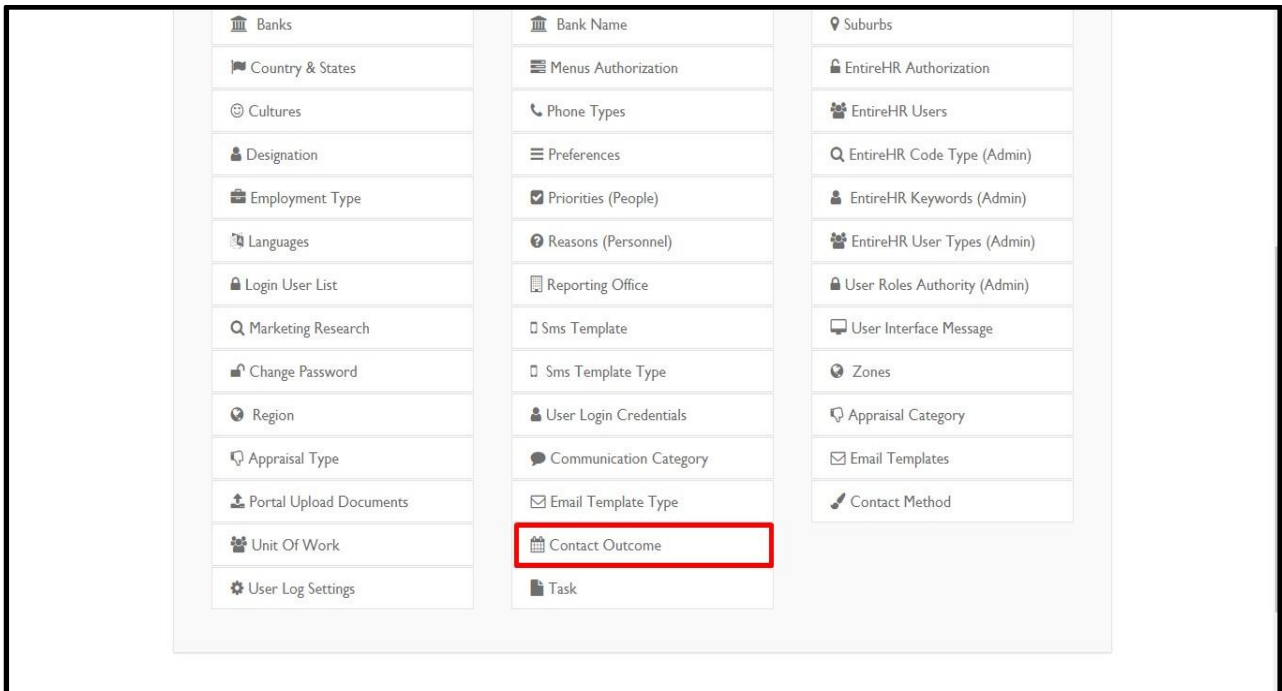

- **Contact Method** is a drop down and shows value defined in Contact Method master. See the below attached screenshot.

- **Contact Reason** is a drop down and shows value defined in Reasons master. See the below attached screenshot.
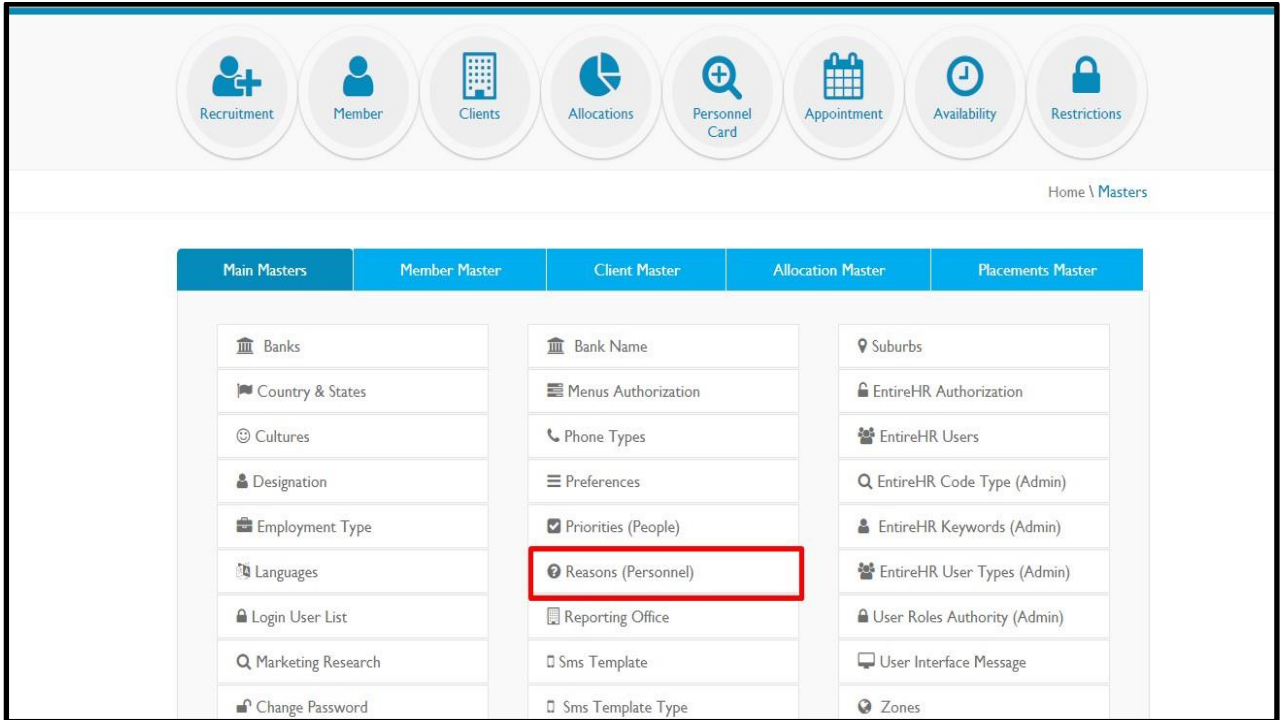
- **Meeting Outcome** is a drop down field and mandatory as it is shown by asterisk. Also it shows the value defined in Contact Outcome master on web.

- **Task Performed** is a drop down field with Main **Parent category** and Child Category added under parent category. Task field is also added in **masters** and same values will appear on App. At a time single parent **Task** value will be selected by user but child can be multiple or single. If user try to select more than one parent then alert will pop up for user to give proper instructions. Please see below attached image for reference.
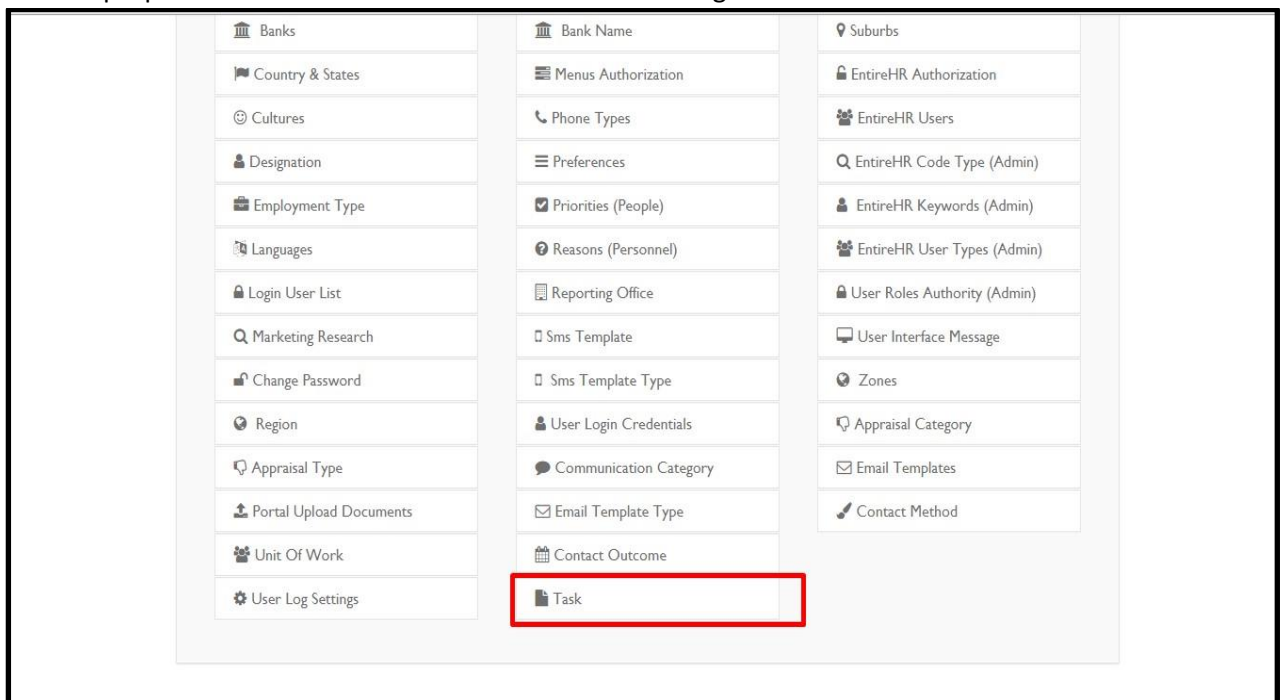
- **Comments** is a text view field. User can add notes or comment, same comment will appear on web in contact log section with **date/time stamp.**
- **Log Meeting** is flag based & only enable if **create log flag is true (Contact log is true)** for client.
- Staff App user can only log meeting details if user is **Checked In** for client. To **Log Meeting** user has to perform **Check-In**.
- After **Check-In** user can **Log Meeting** for client.

- Initially on **Log/Record Meeting Screen** logged in user settings will load if user's setting is not available in **User Log Settings** master then it will load default settings available in master. If default settings are not available then nothing will load on **Record Meeting screen**. User can select and log meeting as per available values in drop down.
- User has to fill all the mandatory fields and tap on save button to **Log/Record meeting details**.
- When user tap on save log meeting details log will be saved in web contact log section.
- For **Log Meeting contact** method is selected by user from drop down and same will be saved in Contact Log.
- On log meeting screen user has one more feature - **Add Appointment.**
- To Add Appointment contact method should be added on **Web -> Master -> Contact Method master.**
- If contact method is not available then user will not be able to **Add Appointment** for client.
- When user tap on **Add Appointment** new screen will open with **Event Name, Event Start Date, Event End Date and Location**. Staff App user can add current date or future date appointment details.
- When user tap on save **Appointment details** will be saved and shown in contact log section on web.
- Same Appointment details will be added in phones calendar. User will get notified according to added **date/time of appointment.**
- Add Appointment is totally separate feature from **Log Meeting.**
- Location is optional to **Add Appointment**.

Contact Log Integration in Client Notes

Notes Feature allows Staff App User to add notes for selected client and same will be shown on web in client profile. But now we have added one additional feature in Notes Contact Log. Previously staff App user creates notes and save but without any log. Log is important concept when we want to track user activities. Log has direct relation with Date/Time.

Notes Feature is available on Staff App for all entireHR Subscriptions. CRM Contact Log is only activated when you have an additional license for it.

See the below attached screenshot for reference. In case of **Contact Log notes** will be shown in contact log section of web. Also to save notes **INTERNAL UPDATES** contact method will be added in master.
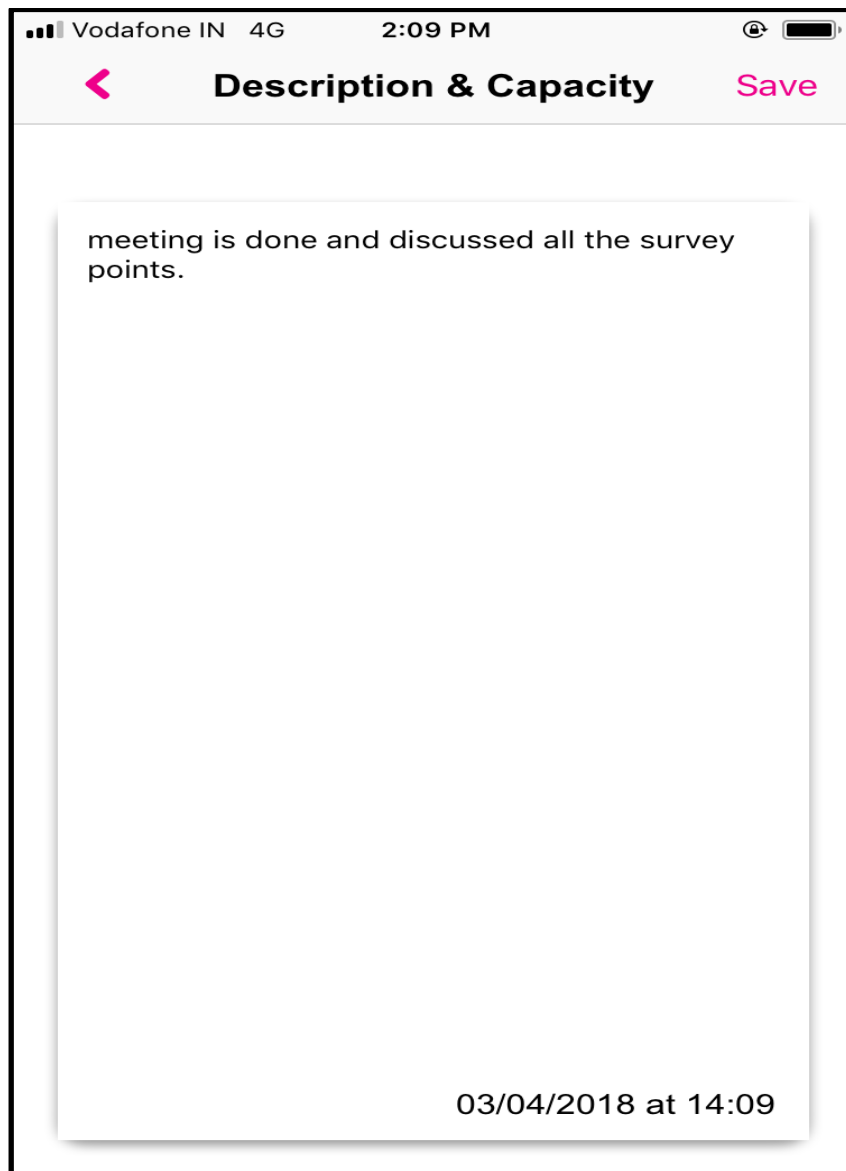
- **Notes** allows to create and save text data on App and same will be shown in web.
- User can add text data without any **limitation**.
- Notes Feature is available in App all the time.
- If **Contact_Log** is true then Notes will be save with logs.
- Also to save notes it is important to have Contact Method INTERNAL **UPDATES** in master.
- If **Contact_Log** is false then Notes will be saved without any logs and there will be no option on web to view Contact Log.
- Every time when user add notes device's time stamp will get added with **Notes**.
- User can view Added Notes from **Web -> Client's Profile and Web -> Marketing Notes section.**

Add Appointment & Contact Log Integration

Introduced **Add Appointment** feature for staff app user so that user can **Add Appointment** for client and best part is the same Appointment will be created on **phone's calendar.** But only if Contact Method is created in master for **Add Appointment**. Add Appointment Feature is also accessible from **Log Meeting Screen** but from that screen user can only access if staff app user is Checked In for Client, As to Log Meeting details Check-In is mandatory. To make user's access easy and smooth we have given **Add Appointment** feature on **Check-In Screen**.

Add Appointment Screen
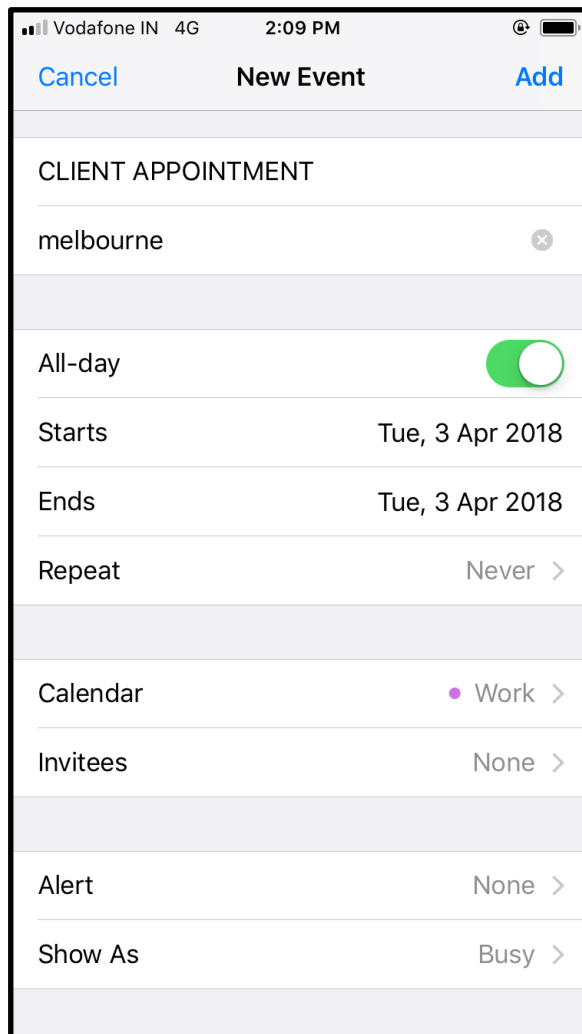
- To add new **Appointment Event Name, Start Date and End Date is mandatory.**
- Above attached screen is default **iOS** Add Event screen.
- In **Android** App we have customized screen for **Add Appointment** only with **Event Name, Start Date and End Date fields.**
- **Location** is optional field in both but in **Android field is** not editable.
- **Add Appointment** Feature will only enable if **Create_Log** is true (**Contact Method**) for client.

- User can access **Add Appointment** Feature from **Check-In** Screen and from Log meeting Screen.
- This feature allows to create same **Appointment** on **Device/Phone's Calendar.**
- User can check added **Appointments** on **Phone's Calendar**.
- When user tap on save button to **create event, Service will first check for contact method.** If Contact Method is available in Contact Method master then it will process the request further.
- If contact method is not available in Contact Method master for **Add Appointment** then error pop up will appear for user to notify that **Contact Method** is missing.
- If contact method is not available in master then it will not allow to **create_log** and Add **Appointment** on **Phone's calendar**.
- Once **Appointment** is successfully created then log will be shown in **contact log** section on web.