AbtracOnLine Trial Checklist

https://support.abtrac.com/abtraconline-trial-checklist/

AbtracOnLine is a large system and chances are you won't be using all of the features listed below.

The point of this checklist is for you to check and compare all the features you use currently in the Abtrac desktop version. It's to help you complete your due diligence in order to prove you've given AbtracOnLine a fair trial and that you understand and accept the differences with Abtrac5.

People tell us this only takes an hour or so, many others have done it with a group of work colleagues to make sure everyone is comfortable before giving us the green light.

In each section enter all the information you normally would and use any variations you may think of.

If you aren't using some of these feature below, then you can most likely skip them in your trial process. If you are interested in using these features in the future then let us know, we'll make a time for a training/support session a couple of months after you've gone live.

**This checklist is best worked through after reading this help file: Upgrading from Abtrac5 to AbtracOnLine*

Administration

Create an employee and edit an existing employee details

Add/Edit Client and Project Owners

Add a new user (this is creating a new login to the system with an email address and password)

Do you have different user permissions YES/NO

> Add a user to a restricted group

> Edit a user group

Check the System Settings

Check the Office Settings

Check the Invoice settings

Clients, Jobs/Projects, Contacts

Create a client

Add an Address

Add a person

Do you use Invoice Defaults YES/ NO

> Create Invoice Default Details

Do you use Client Specific Rates YES/No

> Create some specific rates for some employees

Create a Job or Project

Do you use Project Billing Details YES/NO

Create Project Billing Details

Do you use Associated Entities on a Project (Project People) YES/NO

Add some associated entities to this Project

Do you use Tasks or Stages? YES/NO

Either add a Task one by one or you can clone from an existing Project.

**There are no default Tasks like you're used to in Abtrac 5 so we have the clone feature in its place.*

Do you use Task Groups YES/NO

Enter some Task Groups and assign some tasks to these groups

Do you use Project Specific Rates YES/NO

Add Project Specific Employee Rates

Do you use Project Documents YES/NO

**Project Documents can only work in the location where the document is stored and requires a pre-configured Google Chrome plugin. If this is something that you use we can install and configure this for you.*

Do you use User Defined Fields YES/NO

Enter in some User Defined Fields

Do you use Project Diary YES/NO

Enter in Project Diary Details

Do you use Work Items YES/NO

View or add more work items in

Do you print the Client or Project Details from the Clients Section YES/NO

Use the print features

Do you use Project Analysis YES/NO

Preview the reports that you normally use

Time and Disbursements

Add a new timesheet period ending date

Add some timesheets for various Projects. Remember to enter in task groups, tasks, and activities if you use them.

Does the timesheet view look as expected YES/NO

> To change the timesheet view try clicking the either of the buttons at the top of the page 

Enter in an Employee Disbursement

Commit the timesheet

Print the timesheet

Enter in an Office Disbursement

Work scheduling

Do you use Work Scheduling Planned Time YES/NO

> Schedule in some planned time for yourself
>
> Schedule some planned time for another employee

Do you use Work Scheduling Planned Work Item YES/NO

> Create a new work item
>
> Edit an existing work item

Import Disbursements

Do you use Import Disbursements YES/NO

> Import a disbursement from an existing template.
>
> Edit the imported disbursements

Subconsultant Invoices

Do you use Subconsultants YES/NO

> Add a Subconsultant Invoice

Invoices

Generate an invoice

Do you Generate invoices based on previous invoices YES/NO

Edit an existing invoice line

Create a new invoice line

Assign timesheet lines to an invoice line

Add the different invoice line types (Text/Value, Text Only, Text/Units, Percentage, Progress Claim)

Preview the invoice

> **Note your invoice header and footer will be styled when you are ready to go live, what you are checking now is the invoice lines*

Search for existing invoices

Commit an invoice

View the Summary of Unbilled work

Do you have an accounting package YES/NO

> **Did you know Abtrac can connect to all major accounting software packages? Call us to find out how Abtrac can integrate with your accounting package.*

Debtor Module

Do you have access to the debtors module YES/NO

Record some invoices and payments

View your favourite debtor reports

Update the client details in debtor control

Do you use Statements or Accounts Rendered? YES/NO

> *AbtracOnline doesn't have the ability to generate statements, this is a change from Abtrac5.*
>
> *Statements have been replaced by the Account Rendered - which is a statement of unpaid invoices only.*
>
> *You can preview Accounts Rendered from the Debtor Reports section.*

**Note your account rendered header and footer will be styled when you are ready to go live, what you are checking now is the invoice/payment lines.*

Performance Reports

As part of our preparation and data analysis we retrieved a list of the frequently used reports from your Abtrac5 data. If we've noticed a difference between your Abtrac5 reports and AbtracOnLine then it's likely you've already heard from us.

We have compressed the amount of reports and added more flexible filtering, grouping and sorting of the reports.

It's best to check that the reports that you use are available and that you know how to use the new filters, grouping and sorting.

Preview the reports most used

Do you export reports YES/NO

Print and export the reports

Congratulations

You are well on your way to migrating to AbtracOnline.

Do you have any questions or couldn't find anything? Give us a call and we can help clarify any questions you have.