Wizardly Widgets

End User Guide

Instructions for Entering Business Data

VERSION: 2.3

Table of Contents

Quick Start

Your IT administrator will provide you with an icon () to launch Wizardly Widgets. Your username and password are the same as your network login.

The menu displays on the left. Your administrator has given you security rights to the modules you will need to access.

Click the appropriate menu item to open a module to begin working.

Use **LOGOUT** to close the application.

- **HOME**
- **CUSTOMERS**
  - Customer
  - Billing
  - API Configuration
- **TRAVEL & EXPENSES**
  - Travel Itinerary
  - Mileage Reimbursement
  - Travel Expense Reimbursement
- **TIME**
  - Timesheet
- **LOGOUT**

Customers

Wizardly Widgets provides analog and digital wizarding services and artifacts to software companies and freelance developers. Customer contact and billing information is required before any service or artifact can be provided.

These are the modules related to customer data:

- Customer (contact information, main point of contact, website, etc.)
- Billing (billing address, payment methods)
- API Configuration (information to support digital artifacts)

Customer

After a customer has signed the contract, their basic information is entered into the Customer module. The Sales Team will forward this information to you.

Customer ID	Customer Name	Point of Contact		Sales Mgr	Customer Website
		Name	Address		
47792	Charms Galore	Pietre Gallas	5429 W. Malone	w. CANDL	www.charmgalore.com

Completed Customer Form

1. Go to **Customers** | **Customer**. A blank customer form displays.
2. The **Customer ID** will be automatically created when the customer is saved.
3. Enter the legal **Customer Name**.
4. Enter the **Name** and **Address** for the customer's main **Point of Contact**.
5. Select the **Sales Mgr** assigned to this customer.
6. Enter the URL for the **Customer Website**.

Test the website URL.

7. Click to complete the customer. Click to cancel the customer.
8. The completed customer record will be forwarded to the Sales Manager for review.

Billing

After the Sales Manager has approved the basic customer data, billing information must be entered for the customer. The Sales Team will forward this information to you.

Customer ID	Billing Address	Point of Contact		Payment Method	Payment Terms
		Name	Phone		
47792	5429 W. Malone	Jenny Bobbin	(200) 297.2974	VISA	NET 10

Completed Billing Form

1. Go to **Customers** | **Billing**. A blank billing form displays.
2. Enter the **Customer ID.**
3. Enter the customer's **Billing Address**.
4. Enter the **Name** and **Phone** for the customer's billing **Point of Contact**.
5. Select the **Payment Method** the customer will use.
6. Enter the **Payment Terms** the customer has agreed to.
7. Click to complete the billing information. Click to cancel the billing information.
8. The completed billing record will be forwarded to the Sales Manager for review.

API Configuration

Customers who contract to use digital artifacts will need the API configured to support this service.

Customer ID	Artifact Package	User Name	Password Status	Preferred Location	Active	Start Date
47792	Standard	svc201A	Needs Change	US	Yes	11/21/2023

Completed API Configuration Form

1. Go to **Customers | API Configuration**. A blank configuration form displays.
2. Enter the **Customer ID.**
3. Enter the **Artifact Package** selected by the customer.

   If customer has multiple packages, enter separately.
4. Enter the **User Name**.

   IT will supply this.
5. The **Password Status** will display automatically.
6. Enter the customer's **Preferred Location**.
7. The **Active** flag will display automatically.
8. Enter the **Start Date** of the package.
9. Click to complete the API configuration. Click to cancel the API Configuration information.
10. The completed API configuration will be forwarded to the API Manager for review.

Travel and Expenses

When you travel for business, certain documentation is required:

- Travel Itinerary (for travel with an overnight stay)
- Mileage Reimbursement (to get your mileage reimbursed for short trips)
- Travel Expense Reimbursement (to get travel expenses reimbursed)

Wizardly Widgets books and pays for airline flights. These never need to be expensed. Hotel, car, meals, etc. are reimbursed from a travel expense reimbursement form. If you travel short distances on business travel – purchasing supplies, picking up clients traveling to your office – your mileage will be reimbursed from the mileage reimbursement.

Travel Itinerary

If your travel requires an overnight stay, you must document reservations for flights, car rentals, hotels, and meeting venues. This itinerary must be approved before your trip begins.

Purpose:	Training Instructor for Corporate IT Staff	**Prepared for:**	Harry Potter	**Trip Start:**	11/12/2023
Destination:	Corporate	**Prepared by:**	Ulric Olmanas	**Trip End:**	11/14/2023

DEPARTING FLIGHT

Date	Depart - Location	Depart - Time	Airline	Confirm #	Flight #	Arrival - Location	Arrival - Time	More Info
11/12/2023	TLH	6:30 AM	DELTA	234879759	TLH253	ATL	7:30 AM	PAID FOR BY COMPANY

CAR RENTAL

Date	Company	Street	City	Confirm #	Pick-Up Time	Return Date	Return Time	More Info
11/12/2023	AVIS	2200 Rental Car Center Pkwy	COLLEGE PARK	53987	9:00 AM	11/14/2023	8:00 PM	PAID FOR BY COMPANY

HOTEL

Date	Name	Street	City	Confirm #	Room	Check-In Time	Check-Out Time	More Info
11/12/2023	REGENCY-HYATT	1872 PEACHTREE	ATLANTA	9757972	459	4:00 PM	11:00 AM	

MEETINGS and EVENTS

Date	Venue	Street	City	Confirm #	Topic	Start Time	End Time	More Info
11-13 / 11-14	Corp. Train Room 8	Krog Street	ATLANTA	NA	Training	9:00 AM	4:00 PM	

RETURNING FLIGHT

Date	Depart - Location	Depart - Time	Airline	Confirm #	Flight #	Arrival - Location	Arrival - Time	More Info
11/14/2023	ATLANTA	8:00 PM	DELTA	234879966	ATL2938	TLH	9:30 PM	PAID FOR BY COMPANY

Completed Travel Itinerary

1. Go to **Travel & Expenses | Itinerary**. A blank travel itinerary displays.
2. Enter the **Purpose** and **Destination** of the trip.
3. Enter the employee who will travel in **Prepared for**.
4. Enter the employee who handled the reservations in **Prepared by**.

List everyone who worked on reservations.

5. Enter the **Departing Flight** reservation information.
6. Enter the **Car Rental** reservation information.
7. Enter the **Hotel** reservation information
8. Enter the **MEETINGS** and **EVENTS** information.
9. Enter the **RETURNING FLGIHT** reservation information.
10. Click to complete the itinerary. Click to cancel the itinerary.

Completed itineraries are automatically sent to preparers, the traveler, and the traveler's supervisor.

Mileage Reimbursement

If you use your personal vehicle for business travel, you can be reimbursed for your mileage. The reimbursement rate per mile is the [IRS mileage rate] for business travel.

Emp Name	Harry Potter
Emp Code	HP1029
Dept	Information Technology (IT)

REIMBURSEMENT RATE	**$0.6550**
TOTAL MILES	**268**
TOTAL REIMBURSEMENT	$175.54

DATE OF TRAVEL	PURPOSE OF TRAVEL	ODOMETER READINGS		TOTAL MILES	ADDITIONAL COMMENTS
		START	END		
11/2/2023	To/from Satellite Office	8762	8941	179	Setup/configure new laptops
11/3/2023	To/from Shipping Hub	9241	9330	89	Misdelivered package
				0	

Completed Mileage Form

1. Go to **Travel & Expenses | Mileage Tracking**. A blank mileage tracking form displays.
2. Select your name in **Emp Name**. **Emp Code** and **Dept** should automatically display.

Contact HR if your code and dept are not displayed.

3. Select the date you traveled in **DATE OF TRAVEL**.
4. Enter the reason you traveled in **PURPOSE OF TRAVEL**. Examples: *Attended conference*. *Purchase office supplies*.

Your manager can help you with the purpose.

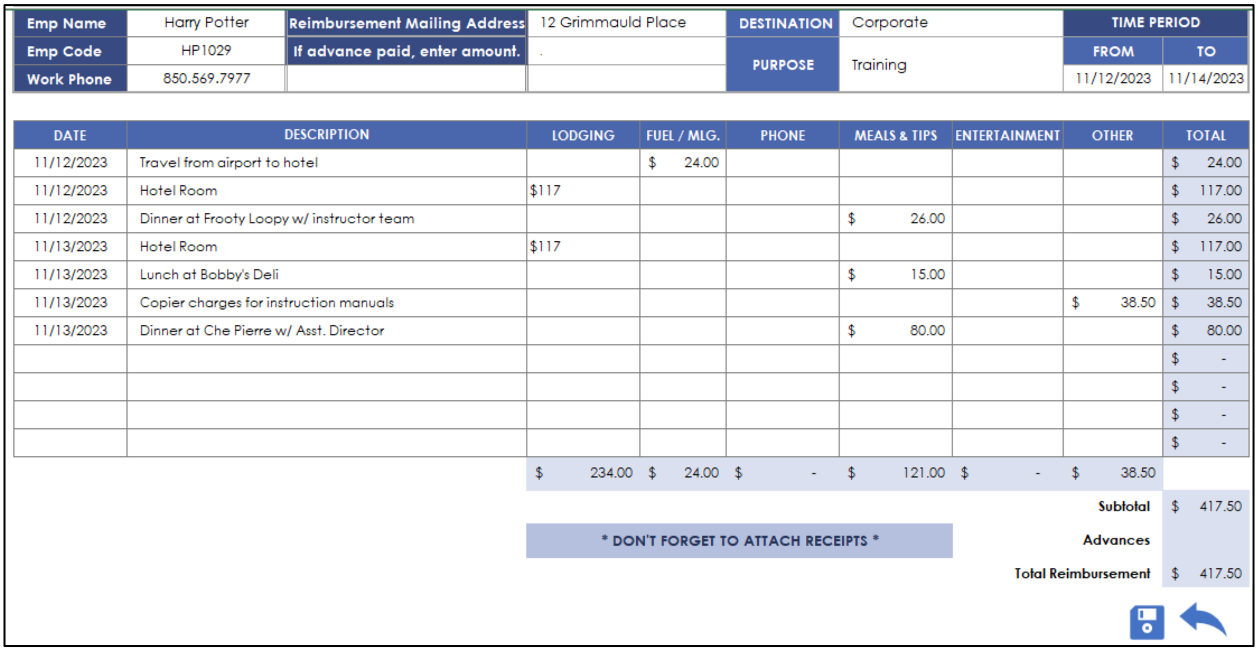
5. Enter your odometer reading at the beginning of your trip in **START**.
6. Enter your odometer reading at the end of your trip in **END**.
7. **TOTAL MILES** (per trip) is automatically calculated for you.
8. Enter notes in **ADDITIONAL COMMENTS**.
9. Click to complete your mileage form. Click to cancel your mileage form.

Total Miles and **Total Reimbursement** are automatically calculated for you.

Completed mileage forms are automatically sent to Accounting. Reimbursement will be direct deposited on the 15th and 30th of each month.

Travel Expense Reimbursement

If you travel for business, you must document your expenses so they can be reimbursed.



Emp Name	Harry Potter	Reimbursement Mailing Address	12 Grimmauld Place	DESTINATION	Corporate	TIME PERIOD	
Emp Code	HP1029	If advance paid, enter amount.	.	PURPOSE	Training	FROM	TO
Work Phone	850.569.7977					11/12/2023	11/14/2023

DATE	DESCRIPTION	LODGING	FUEL / MLG.	PHONE	MEALS & TIPS	ENTERTAINMENT	OTHER	TOTAL
11/12/2023	Travel from airport to hotel		$ 24.00					$ 24.00
11/12/2023	Hotel Room	$117						$ 117.00
11/12/2023	Dinner at Frooty Loopy w/ instructor team				$ 26.00			$ 26.00
11/13/2023	Hotel Room	$117						$ 117.00
11/13/2023	Lunch at Bobby's Deli				$ 15.00			$ 15.00
11/13/2023	Copier charges for instruction manuals						$ 38.50	$ 38.50
11/13/2023	Dinner at Che Pierre w/ Asst. Director				$ 80.00			$ 80.00
								$ -
								$ -
								$ -
								$ -
		$ 234.00	$ 24.00	$ -	$ 121.00	$ -	$ 38.50	
							Subtotal	$ 417.50
		* DON'T FORGET TO ATTACH RECEIPTS *					Advances	
							Total Reimbursement	$ 417.50

Completed Expense Form

1. Go to **Travel & Expenses** | **Travel Expenses**. A blank travel expense form displays.
2. Select your name in **Emp Name**. **Emp Code** and **Dept** should automatically display.
3. In **Reimbursement Mailing Address**, enter the mailing address for the reimbursement check.
4. Enter the advance amount in **If advance paid, enter amount**.
5. Enter the location you traveled to in **DESTINATION**.
6. Enter the reason for the travel in **PURPOSE**.
7. Enter the begin and end dates for your travel in **FROM** and **TO**.
8. For each expense, enter the **DATE** and **DESCRIPTION**. Enter the amount of the expense in the appropriate column – **LODGING**, **FUEL/MLG**, etc.
9. Click to complete your travel expense. Click to cancel your travel expense form.

Contact HR if your code and dept are not displayed.

Enter DIRECT DEPOSIT if preferred.

MM/DD/YYYY is preferred format.

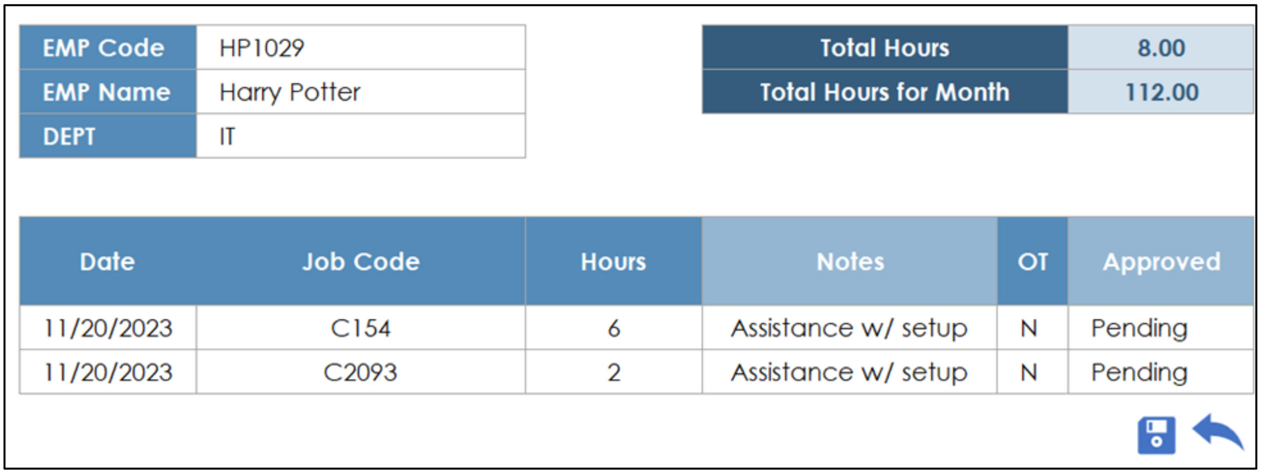
Totals are automatically calculated for you.

Completed mileage forms are automatically sent to Accounting. Reimbursement will be direct deposited on the 15th and 30th of each month.

Time

Timesheet

Enter your working hours in the Timesheet module on a daily basis.



EMP Code	HP1029
EMP Name	Harry Potter
DEPT	IT

Total Hours	8.00
Total Hours for Month	112.00

Date	Job Code	Hours	Notes	OT	Approved
11/20/2023	C154	6	Assistance w/ setup	N	Pending
11/20/2023	C2093	2	Assistance w/ setup	N	Pending

Completed Timesheet

1. Go to **Time** | **Timesheet**. A blank timesheet form displays.
2. Select your name in **Emp Name**. **Emp Code** and **Dept** should automatically display.

Contact HR if your code and dept are not displayed.

3. Enter the **Date** you worked this time.
4. Enter the **Job Code** for the time you worked.
5. Enter the **Hours** you worked.

Partial hours are recorded to the nearest quarter. (1.25)

6. Enter **Notes** if the **Job Code** requires notes.
7. Enter **Y** in the OT column if the time worked should be paid as overtime.
8. The Approved column will be updated when your supervisor reviews your time.
9. Click to complete your timesheet. Click to cancel your timesheet.
10. The timesheet is automatically sent to your supervisor.

Total Hours and **Total Monthly Hours** are automatically calculated for you.