

# Employee Activity Tracking System - Tutorial

### What is this system?

Our CRM now tracks how much time you spend using the system each day. This helps management understand productivity and usage patterns.

# How it Works (Automatic)

### GOOD NEWS: It's Mostly Automatic!

- Starts automatically when you log into the CRM
- Stops automatically when you log out
- Pauses automatically when you switch to other tabs/apps
- Resumes automatically when you come back to CRM

#### What You'll See

In the top navigation bar, you'll see a timer widget showing:

- **Today's Time**: "2h 30m" (your total time today)
- Status: "Active" or "Paused"
- III Manual Controls: Pause/Resume buttons

## Simple Steps for Employees

#### Step 1: Login as Usual

- Go to CRM website
- Login with your username/password
- Timer starts automatically!

#### **Step 2: Work Normally**

- Use CRM as you normally do
- Timer runs in background
- No need to do anything special

#### Step 3: When You Leave CRM

- Switch to other tabs → Timer pauses automatically
- Come back to CRM → Timer resumes automatically
- Close browser → Timer stops automatically

#### Step 4: Manual Control (Optional)

If you need to pause manually:

- Click III "Pause" button in top bar
- Click ► "Resume" when ready to continue

### **6** What Gets Tracked?

### Counted as Active Time:

- Working in CRM (leads, sales, reports)
- Reading/updating customer information
- Making calls through CRM
- Any active CRM usage

### Automatically Paused:

- Switching to other websites/apps
- Taking phone calls outside CRM
- Lunch breaks (if you switch tabs)
- Computer goes to sleep/lock

#### Daily Summary:

- Total time spent in CRM each day
- Displayed in hours and minutes (e.g., "6h 45m")
- Resets at midnight for new day

### What Admins Can See

#### Admins and Managers can view:

- Daily usage time for each employee
- Weekly/monthly activity reports
- Team productivity statistics
- Individual employee details

#### X Admins CANNOT see:

- · What specific pages you visit
- Your personal conversations
- Screen recordings or screenshots
- · Activity outside of CRM

## Troubleshooting

#### **Timer Not Starting?**

- 1. Refresh the page (F5)
- 2. Log out and log back in
- 3. Clear browser cache

#### Timer Stuck on "Paused"?

- 1. Click "Resume" button manually
- 2. Refresh the page if needed

#### **Time Seems Wrong?**

- 1. Check if you switched tabs frequently
- 2. Timer pauses when not actively using CRM
- 3. Contact admin if still incorrect

## Quick Reference Card

- ACTIVE = Timer running (you're using CRM)
- PAUSED = Timer stopped (you're away from CRM)
- ▶ RESUME = Start timer manually
- PAUSE = Stop timer manually

## **Tips for Accurate Tracking**

#### DO:

- Keep CRM tab active when working
- Use manual pause for long breaks
- Value Log out when done for the day
- V Let it run automatically

#### DON'T:

- X Worry about switching tabs briefly
- X Keep CRM open when not working
- X Try to "game" the system
- X Leave computer on overnight with CRM open

## Need Help?

#### **Contact your Admin or Manager if:**

- Timer is not working properly
- · Time tracking seems incorrect
- You have questions about the system
- · Technical issues occur

## Benefits for Everyone

#### For Employees:

- V Fair tracking of actual work time
- No manual time sheets to fill
- V Automatic and accurate
- V Privacy-focused (only tracks CRM usage)

#### For Management:

- ▼ Better understanding of CRM usage
- V Fair performance evaluation
- V Identify training needs
- Optimize work processes

## WhatsApp Summary Message

#### Copy this message to send to employees:

NEW: CRM Activity Tracking is Now Live!

What it does: Automatically tracks your CRM usage time each day

**How it works:** ✓ Starts when you login ✓ Pauses when you switch tabs ✓ Resumes when you return ✓ Stops when you logout

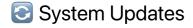
What you need to do: NOTHING! It's automatic

Where to see it: Timer widget in top navigation bar

**Questions?** Contact your manager

Important: Only tracks CRM usage time, nothing else. Your privacy is protected.

This system helps us understand productivity and improve our processes. Thank you for your cooperation!



#### **Version 1.0 - Current Features:**

- Automatic session tracking
- Manual pause/resume controls
- Daily time summaries
- Admin dashboard with reports
- · Privacy-focused tracking

#### **Coming Soon:**

- · Weekly/monthly reports
- · Goal setting features

- Performance insights
- Mobile app support

Last Updated: December 2024 System Status: ✓ Active and Running