

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"
 -  **Manual Controls:** Pause/Resume buttons
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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  "Pause" button in top bar
 - Click  "Resume" when ready to continue
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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
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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

Admins CANNOT see:

- What specific pages you visit
 - Your personal conversations
 - Screen recordings or screenshots
 - Activity outside of CRM
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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)
-  TIME = Total time today (resets at midnight)
-  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
-  Log out when done for the day
-  Let it run automatically

DON'T:

-  Worry about switching tabs briefly
-  Keep CRM open when not working
-  Try to "game" the system
-  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:

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

For Management:

-  Better understanding of CRM usage
-  Fair performance evaluation
-  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!



System Updates

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