

# Time Reporting Procedure

As of 1/1/2014 all representatives performing events for PromoWorks will be converted to W2 employees for CROSSMARK. As part of that transition you will be required to report time via the Time and Expenses screen within the PromoWorks Engagement Specialist portal for each event scheduled.

The screenshot shows the PromoWorks Engagement Specialist portal. At the top, there is a login bar with a globe icon and the URL <https://esmyhome.promoworks.com>. Below this is a navigation menu with options: Menu, Reset Password, Help, Contact Us, and Log Off. The 'Menu' dropdown is open, showing options: Library, Time and Expenses (highlighted), Execution/Schedule, Pay History, and My Profile. The main content area has a 'Welcome!' message and a 'PromoWorks' logo. Below the logo, there is a message about the integration with CROSSMARK. At the bottom, there is a table with columns: Project (Retailer), PromoReport Code (Store), Work Date, Activity Type, Start Time, End Time, Minutes, Pay Date, and an 'Add' button. The table contains 9 rows of data, including entries for 'In-store time', 'Break time - paid', 'Training time', and 'Card activation'. The table is paginated, showing '1 - 9 of 9 items'.

| Project (Retailer) | PromoReport Code (Store) | Work Date | Activity Type     | Start Time | End Time | Minutes | Pay Date |                     |
|--------------------|--------------------------|-----------|-------------------|------------|----------|---------|----------|---------------------|
| 3440000 (Publix)   | 162 (146)                | 1/31/2014 | PromoReport       | 6:00 PM    | 6:20 PM  | 20      |          | [ Edit ] [ Remove ] |
| 3440000 (Publix)   | 162 (146)                | 1/31/2014 | In-store time     | 3:02 PM    | 4:02 PM  | 60      |          | [ Edit ] [ Remove ] |
| 3440000 (Publix)   | 162 (146)                | 1/31/2014 | Break time - paid | 2:46 PM    | 3:01 PM  | 15      |          | [ Edit ] [ Remove ] |
| 3440000 (Publix)   | 162 (146)                | 1/31/2014 | In-store time     | 12:17 PM   | 2:45 PM  | 148     |          | [ Edit ] [ Remove ] |
| 3440000 (Publix)   | 162 (146)                | 1/31/2014 | Break time - paid | 12:01 PM   | 12:16 PM | 15      |          | [ Edit ] [ Remove ] |
| 3440000 (Publix)   | 162 (146)                | 1/31/2014 | In-store time     | 10:00 AM   | 12:00 PM | 120     |          | [ Edit ] [ Remove ] |
| 3440000 (Publix)   | 162 (146)                | 1/30/2014 | Training time     | 6:06 PM    | 6:22 PM  | 16      |          | [ Edit ] [ Remove ] |
| 3440000 (Publix)   | 162 (146)                | 1/30/2014 | Card activation   | 6:00 PM    | 6:05 PM  | 5       |          | [ Edit ] [ Remove ] |
| 3440000 (Publix)   | 162 (146)                | 1/28/2014 | In-store time     | 3:25 PM    | 3:35 PM  | 10      |          | [ Edit ] [ Remove ] |

- A Log in to: <https://esmyhome.promoworks.com>
- B Click **Menu** and select the **New Time and Expense** option. The first section of the screen is for searching existing entries.
- C Click the **Add** button in the time grid.
- D Select the **project** you wish to report time against from the project (retailer) drop down list.
- E Confirm that the **PromoReport code is correct**. IF you are scheduled for more than one day in a project you will need to choose the correct one you are reporting for.
- F Enter or select the **date** on which the specific work activity occurred.

You **cannot enter overlapping time**. Below is an example of what you might enter for a demo on 1/18/14. Notice the Card Activation and Pre-Call time are listed prior to the day of the demo.

1/15/14 – In-Store Time (this would be for the Pre-call) - 9:30am-9:40am  
1/17/14 – Card Activation - 9am-9: 05am  
1/18/14 – In-Store Time - 11am-1pm-**Before** break  
1/18/14 – Meal Period – unpaid - 1:01pm-1:30pm- Unpaid meal break  
1/18/14 – In-Store Time - 1:31pm-5pm – **After** Break  
1/18/14 – PromoReport (this would be the time you spend entering the data from your report form and entering your time) - 6pm-6:10pm

When you enter the time in, you can use the scroll bar to select the proper time or you can type the time in on your keyboard – just put a space between the time and the AM or PM!

Make sure you are checking the AM and PM for accuracy.

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https://esmyhome.promoworks.com

Home Menu Reset Password Help Contact Us Log Off

Welcome!

**PromoWorks** Specialist Integration with CROSSMARK

As you may have heard, CROSSMARK is now the assets of PromoWorks. That means that the great consumer done by PromoWorks will be bolstered by the strength and resources of CROSSMARK.

Time

| Project (Retailer)  | PromoReport Code (Store) | Work Date | Activity Type   | Start Time | End Time | Minutes | Pay Date |                     |
|---------------------|--------------------------|-----------|-----------------|------------|----------|---------|----------|---------------------|
| 7530531 ( Wakefern) | 1 (17)                   | 12/6/2013 | In-store time   | 8:00 AM    | 2:00 PM  | 360     |          | [ Edit ] [ Remove ] |
| 7530531 ( Wakefern) | 1 (17)                   | 12/6/2013 | Card activation | 7:50 AM    | 7:55 AM  | 5       |          | [ Edit ] [ Remove ] |

1 - 2 of 2 items

- G Select the activity type** that you are reporting time against. For each project you enter you will have several entries to make to account for your time spent on the job and on breaks or lunch. Please note that none of your entries can overlap. Not all entries for a project will be on the same date. For example you will report your pre call time on the day you actually made the pre call.
- H Enter or select your start and end time** for the task you are entering.
- I Double check** your entry and if all is correct click **save**.

***Please note that you are required to take meal periods and rest breaks as applicable by law. Please contact your supervisor if you need clarification of when these are applicable.***

# Time and Expense Reporting Procedure Considerations

## Notes:

Time and Expense reporting is replacing the old Time Invoice- **It is still mandatory that you report the PromoReport Form either via Telephone or computer.**

If you are only scheduled to execute one event for the project selected, then the PromoReport Code (Store) drop down list should be pre-populated with the information for the day scheduled.

If, however you are scheduled for multiple events for the same project you must select the PromoReport Code or Store option that corresponds to the store day for which you are reporting time.

Next, you will need to enter or select from the calendar control the date on which the specific work activity occurred.

Please Note: some activities will be performed on days other than the date that the event is scheduled.

Please be sure to enter the date that the actual work was performed.

You will then need to select the activity type that you are reporting time against.

In many instances you will need to record multiple in-store activities for the same date to correctly represent in-store work time as well as breaks or meal periods taken.

If your demo requires an appliance that appliance will automatically be added to your payment. The payment of \$1.00 for the use of your table and table cloth is also added.

# Time Reporting Procedure Considerations

When reporting time the options available are:

- Break time – paid
- Card Activation
- Drive time- must be pre approved
- In-store time
- Meal period – unpaid
- PromoReport
- Training time
- Manager Refusal
- No Product

The options available are related to the activities below. Please Note: not all activity types are applicable to all events

**Break time-paid** – should be selected to record break time taken during the event.

**Card Activation** – If the event scheduled has a purchase card that required activation prior to use, this activity type should be selected to record time performing that action.

**Drive time** - Drive time is allowed when driving between multiple locations on the same day, and when drive time exceeds 60 minutes from home to the first location or from the last location home (i.e. store location is 75 minutes from home, only 15 minutes of drive time should be recorded)

**In-store time** – this option should be selected when entering time when you are in-store for the event. Please note this option should not be selected for events where you have arrived on site and the event was not executed due to 'no product' or 'manager refusal'. *Please note pre call time should be reported as in-store time and should be reported on the day you make the pre call.*

**Meal period** – unpaid - should be selected to record any meal periods taken during the event.

**PromoReport** – This activity should be selected to record time associated with reporting your event results either via the PromoReport entry link in the portal or via the toll free number supplied on the PromoReport form.

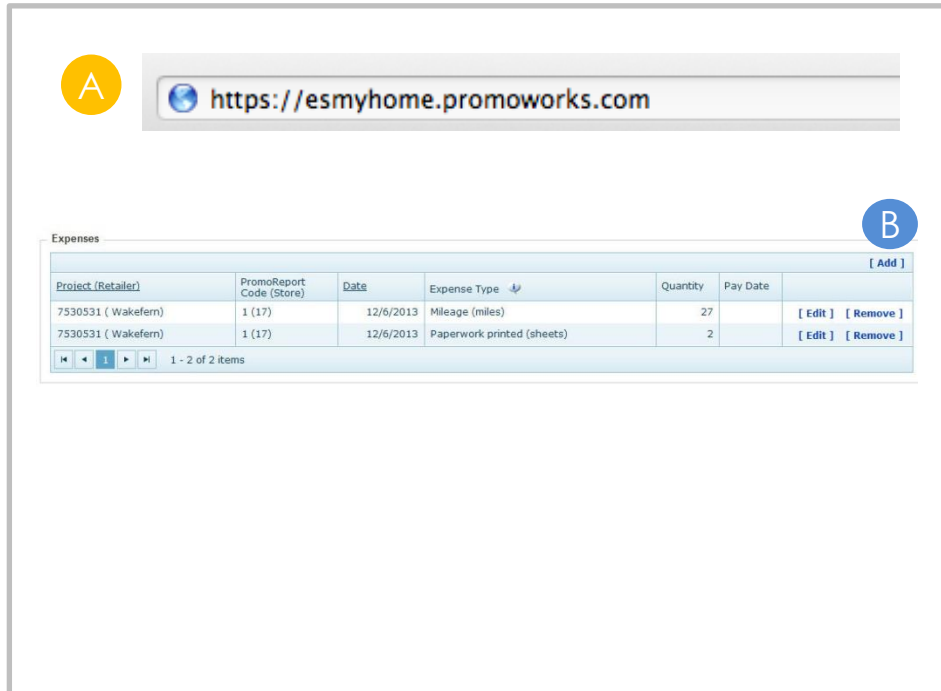
**Training time** – This activity should be selected if there is a training activity that is required for you to successfully execute your event that you have completed. Training may be in the form of Online or IVR Learning Center scripts, In person or phone training.

**Manager Refusal and No Product** - This option should be selected in the event that you arrive at the event location and are informed that the event cannot be executed due to **No Product or Manager Refusal**. In these cases please be sure to select the appropriate activity and report only the time you are in store and not the time that was scheduled for the event.

In most instances you will need to record multiple in store activities for the same date to correctly represent in store work time as well as breaks or meal periods taken.

# Expense Reporting Procedure

You will also use the Time and Expenses screen to reflect some additional expenses that you may have incurred as a function of performing the in-store event. To report expenses related to mileage and printing, follow the procedure below.



A

<https://esmyhome.promoworks.com>

B

Expenses

| Project (Retailer)  | PromoReport Code (Store) | Date      | Expense Type               | Quantity | Pay Date |                     |
|---------------------|--------------------------|-----------|----------------------------|----------|----------|---------------------|
| 7530531 ( Wakefern) | 1 (17)                   | 12/6/2013 | Mileage (miles)            | 27       |          | [ Edit ] [ Remove ] |
| 7530531 ( Wakefern) | 1 (17)                   | 12/6/2013 | Paperwork printed (sheets) | 2        |          | [ Edit ] [ Remove ] |

1 - 2 of 2 items

A At the bottom of the page you will find the section to report any **approved mileage or printing expenses**.

B Click the **Add** button in the Expenses grid, and make the same project, store and date selections as you made for your time entry.

**Confirm** the time entered is complete and accurate for each entry.

Please be sure to confirm the time entered is complete and accurate for each of the activities recorded.

To report any additional expenses related to an event where there is not an applicable option available on the Time and Expenses you will need to submit those additional expenses via the Concur system accessible via [www.crossmarkconnect.com](http://www.crossmarkconnect.com)

# Expense Reporting Procedure Considerations

You will also use the Time and Expenses screen to reflect some additional expenses that you may have incurred as a function of performing the in store event. To report Expenses, you will click the Add button in the expenses grid, and make the same project, store, date selections as above. As a reminder the date entered should reflect the date that the activity took place which may not be the date of the scheduled event. The expense types are limited to:

1. **Mileage** (miles)
2. **Paperwork printed** (sheets)

The options available are related to the expense types below. Reminder: not all expense types are applicable to all events. *All mileage needs to be pre-approved by your scheduler.*

**Mileage (miles)** - should be selected to reflect mileage **over** 40 miles each way. Only the excess miles should be reported here. For example if your event is 45 miles each direction you should enter 10 for the quantity.

**Paperwork printed (sheets)** – This option should be selected for events where you are required to print out project related documents for the store day event. The quantity entered here should reflect the total number of sheets that were printed.

***Please note you are required to take meal periods and rest breaks as applicable by law. Please contact your supervisor if you need clarification of when these are applicable.***

The minutes field is a calculated field that is displayed in the time grid only. Start and end time activities are recorded as time and the minutes are calculated based on those values. Please be sure to confirm the time entered is complete and accurate for each of the activities recorded.

**Pay Date** – this column is blank until the payroll records are exported for the entries. Once exported the pay date will reflect the date that pay is anticipated to be received for the time recorded.

To report any additional time related to an event where there is not an applicable option available on the Time and Expenses you will need to contact the help desk or your supervisor.

To report any additional expenses related to an event where there is not an applicable option available on the Time and Expenses you will need to submit those additional expenses via the Concur system accessible via [www.crossmarkconnect.com](http://www.crossmarkconnect.com). An example of this would be if you needed to use your own funds to purchase product due to a debit card issue.