

HRMates Task Hub Data Collection Guide

Field staff does work punch from mobile with face, geo coordinates and selected Site.
HRMates geofences with selected site and opens Task sheets for field data entry.



Setup Employee

New Employee, Enable Employee

<https://help.hrmates.com/new-employee-process>

Mobile app Help

[Using HRMates Mobile App | HRMates Help](#)

To add Employee for work punch use **Task Hub Management** menu -> **Add Employees** button

To remove Employee for work punch use **Task Hub Management** menu -> Click **Eligible** button. Select and delete Employee

Note:

It will take 1 hour for employee to see the options on his mobile after addition

The screenshot displays the HRMates Task Hub Management interface. On the left is a dark sidebar menu with the TUFCONXT logo at the top and the user profile 'Amrita Singh' below it. The menu items include Self Service, Organization, Hiring, Workforce (with a '37' badge), Exit, Attendance, Learning & Growth, Payroll, Travel & Expense, Performance, Assets, Document Management, Survey Management, Helpdesk Administration, Client Management, and Vendor Management. The 'Task Hub Management' item at the bottom of the sidebar is highlighted with a red box. The main content area is titled 'Task Hub Management' and features a search bar for 'Staff Ids / Employee Name' and an 'Upload Components' button. Below this is a table with columns for 'Template Name' and 'Activities'. The first row is 'Sales Visits' with a total of 37. A red box highlights the '+ Add Employees' button within this row. The 'Activities' column for this row shows 'Eligible' with a 'Paused: 35 37' status, also highlighted with a red box. Below the 'Eligible' status are buttons for 'Suspend', 'Pause Control', 'Approval Control', 'Download', and 'Download Letters'. The second row is 'Sales Visits 02-Oct-2023 to 08-Oct-2023' with a total of 2, showing 'Self' activity with a '2' count. The third row is 'Sales Visits 09-Oct-2023 to 15-Oct-2023' with a total of 37, showing 'Self' activity with a '37' count. At the bottom of the interface, there is a table with columns for 'Rating', 'Letter Type', 'Remarks', and 'CB Row'.

Manage Dealers

Add Modify and Delete Dealers using Site Grid as on Right

To enter Geo coordinates of Dealer location from Mobile click on **Manage Sites**. Then proceed as below

The screenshot shows the 'Site' management interface. At the top, there is a search bar and a grid of site entries. The first entry is selected, and a modal form is open for editing. The form includes fields for Site name, State, Type, Address, Unit Login, Location Code, Country, and Time Zone. Below the form is a 'Geo Coordinates' section with input fields for Latitude and Longitude, and a 'Set Current Location' button highlighted with a red box.

The navigation menu is shown on the left side of the screen. It includes options like Hiring, Workforce (highlighted with a red box), Administration, Employee Letters, Email, Search, Discipline, Announcements, Discussions, Employment (highlighted with a red box), Policy, Exit, Attendance, Learning & Growth, Payroll, Travel & Expense, Performance, Assets, Document Management, Survey Management, Helpdesk Administration, Client Management, Vendor Management, Task Hub Management, Project, Business Excellence, Social, and Reports.

The desktop interface shows a 'Location' table at the top and a 'Site' table below it. A modal form for editing a site is open, showing fields for Site name, State, Type, Address, Unit Login, Location Code, Country, and Time Zone. The 'Geo Coordinates' section is also visible, with input fields for Latitude and Longitude, and a 'Set Current Location' button highlighted with a red box.

Employee Work Punch

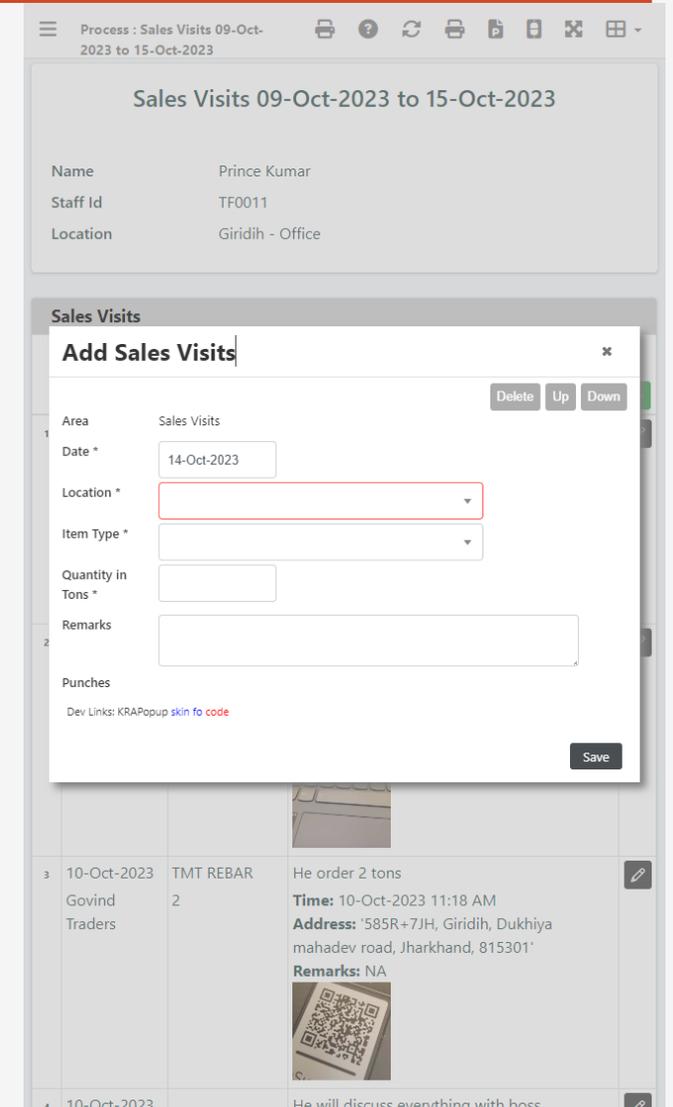
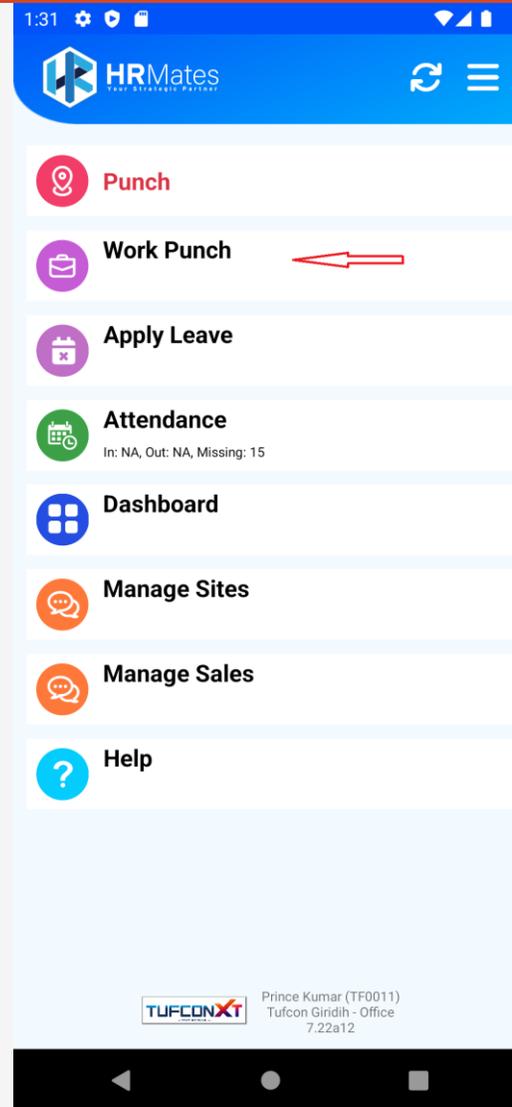
The employee is required to record their work activity by making a work punch when they commence their route and at each dealer location they visit. A final work punch is also necessary upon completing the route. When calculating the route for work purposes, only the work punches are taken into consideration.

For attendance tracking, there are two options available in accordance with the company's policy:

1. Utilize both the check-in and check-out system along with work punches. (Default)
2. Use only the check-in and check-out system, without utilizing work punches.

During work punches, employees have the ability to input details about their visits.

Employee can use Manage Sales to edit the current week task sheet from mobile. Options in location are sorted by distance to current location.



Track Work Punches

Open **Task Hub Management** menu -> Enter **Employee Code** or **Name** -> Click **Search** icon -> click **Edit** button for the week

This will open the **Sales Visit Sheet** showing all data

Task Hub Management

+ Copy Template

TF0011

Upload Components +

Template Name	Activities								
<input type="checkbox"/> Sales Visits Total: 37	Eligible Paused: 35 37 Search Employees Suspend Pause Control Approval Control Download Download Letters <table border="1"><thead><tr><th>Employee</th><th>Reference</th><th>Pending With</th><th>Compliance Date</th></tr></thead><tbody><tr><td><input type="checkbox"/> Prince Kumar TF0011 S.O</td><td></td><td>Prince Kumar TF0011 S.O</td><td></td></tr></tbody></table>	Employee	Reference	Pending With	Compliance Date	<input type="checkbox"/> Prince Kumar TF0011 S.O		Prince Kumar TF0011 S.O	
Employee	Reference	Pending With	Compliance Date						
<input type="checkbox"/> Prince Kumar TF0011 S.O		Prince Kumar TF0011 S.O							
<input type="checkbox"/> Sales Visits 02-Oct-2023 to 08-Oct-2023 Total: 2	Self 2 Search Employees Suspend Pause Control Approval Control Download Download Letters <table border="1"><thead><tr><th>Employee</th><th>Reference</th><th>Pending With</th><th>Compliance Date</th></tr></thead><tbody><tr><td><input type="checkbox"/> Prince Kumar TF0011 S.O</td><td></td><td>Prince Kumar TF0011 S.O</td><td></td></tr></tbody></table>	Employee	Reference	Pending With	Compliance Date	<input type="checkbox"/> Prince Kumar TF0011 S.O		Prince Kumar TF0011 S.O	
Employee	Reference	Pending With	Compliance Date						
<input type="checkbox"/> Prince Kumar TF0011 S.O		Prince Kumar TF0011 S.O							
<input type="checkbox"/> Sales Visits 09-Oct-2023 to 15-Oct-2023 Total: 37	Self 37 Search Employees Suspend Pause Control Approval Control Download Download Letters <table border="1"><thead><tr><th>Employee</th><th>Reference</th><th>Pending With</th><th>Compliance Date</th></tr></thead><tbody><tr><td><input type="checkbox"/> Prince Kumar TF0011 S.O</td><td></td><td>Prince Kumar TF0011 S.O</td><td></td></tr></tbody></table>	Employee	Reference	Pending With	Compliance Date	<input type="checkbox"/> Prince Kumar TF0011 S.O		Prince Kumar TF0011 S.O	
Employee	Reference	Pending With	Compliance Date						
<input type="checkbox"/> Prince Kumar TF0011 S.O		Prince Kumar TF0011 S.O							

Sales Visits 09-Oct-2023 to 15-Oct-2023

Name Prince Kumar
Staff Id TF0011
Location Giridih - Office

Sales Visits

Copy Area

Date * Location *	Item Type * Quantity in Tons *	Remarks Punches
1 10-Oct-2023 Amit Kr Singh		Time: 10-Oct-2023 02:50 PM Address: 585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301 Remarks: order 
2 10-Oct-2023 Amit Kr Singh		Not ordered Time: 10-Oct-2023 11:16 AM Address: '585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301' Remarks: NA 
3 10-Oct-2023 Govind Traders	TMT REBAR 2	He order 2 tons Time: 10-Oct-2023 11:18 AM Address: '585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301' Remarks: NA 
4 10-Oct-2023 Amit Kr Singh		He will discuss everything with boss. Time: 10-Oct-2023 11:21 AM Address: '585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301' Remarks: NA 

Reimbursements Management

To see individual employee Route for a day

Workforce -> **Admin** -> Search Employee -> Select Employee -> **Attendance** Button -> Select Day row -> Click **Show Route** button

Note **Show Route** is available only for yesterday and before

For Routes Report

Reports -> **Module Leave & Attendance** -> Report **Routes** -> Select Filter options and click **Download Report** or **View Report** button

Route Calculation

If employee makes Work Punches at locations A B C D. Routes distances will be calculates as A-B, B-C, C-D using google maps shortest distance.

10-Oct-2023

Serial	Start Time	End Time	Start Address	End Address	Distance
A-B	10-Oct-2023 14:50	10-Oct-2023 14:50	585R+7JH, Dukhiya mahadev road, Giridih, Harsingh Raidih, Jharkhand 815301, India	585R+7JH, Dukhiya mahadev road, Giridih, Harsingh Raidih, Jharkhand 815301, India	0
B-C	10-Oct-2023 14:50	10-Oct-2023 14:50	585R+7JH, Dukhiya mahadev road, Giridih, Harsingh Raidih, Jharkhand 815301, India	585R+7JH, Dukhiya mahadev road, Giridih, Harsingh Raidih, Jharkhand 815301, India	0
C-D	10-Oct-2023 14:50	10-Oct-2023 14:50	585R+7JH, Dukhiya mahadev road, Giridih, Harsingh Raidih, Jharkhand 815301, India	585R+7JH, Dukhiya mahadev road, Giridih, Harsingh Raidih, Jharkhand 815301, India	0
Total					0

Staff Id	Name	Start Time	Start Address	End Time	End Address	Distance
TF0011	Prince Kumar	10-Oct-2023 11:16	'585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301'	10-Oct-2023 11:18	'585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301'	0
		10-Oct-2023 11:18	'585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301'	10-Oct-2023 11:21	'585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301'	0
		10-Oct-2023 14:50	585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301	10-Oct-2023 11:16	'585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301'	0
		12-Oct-2023 13:53	585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301	12-Oct-2023 13:53	'585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301'	0
		12-Oct-2023 13:53	'585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301'	12-Oct-2023 14:29	'585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301'	0
TF0001	Shubham Sinha	04-Oct-2023 13:31	585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301	04-Oct-2023 15:17	585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301	0
		04-Oct-2023 15:15	585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301	04-Oct-2023 15:17	585R+7JH, Giridih, Dukhiya mahadev road, Jharkhand, 815301	0
		05-Oct-2023 14:19	E-55, Sector 28, Gurugram, Haryana, 122022	05-Oct-2023 14:20	E-55, Sector 28, Gurugram, Haryana, 122022	0
		05-Oct-2023 14:20	E-55, Sector 28, Gurugram, Haryana, 122022	05-Oct-2023 14:21	E-55, Sector 28, Gurugram, Haryana, 122022	0
		05-Oct-2023 14:21	E-55, Sector	05-Oct-2023 14:36	585R+7JH,	1,29

Track Field Employee Visits

Reports -> Module Task Hub -> Report Task Hub -> Select Filter options and click Download button

Filter

Period Covered From and **To** will report on task sheets overlapping this period

To get Report of few employees, use **Staff Id** field

Module * Task Hub
Reports * Task Hub Detail Report
Post Date From
Period Covered From 01-Oct-2023 13-Oct-2023
Type Task Hub
Evaluation Name
Areas
Approved Activities
Name Type
Location
Group
Grade
Category
 Exclude Ex Employees
Ex-Employee as on date will be ignored.
Sort By
Staff Id
Units +
 Department
Customized Report
Customized this report from Workforce => Employment => Customize report grid.
Employee
 Refresh Page to Update Status

Task Hub Detail Report Year: Time 14-Oct-2023 13 03

Sales Visits																	
Name	Employee	Staff Id	Evaluation Number	Reporting	Location	Designation	Department	Pending With	Status	Status Date	#	Date	Location	Item Type	Quantity in Tons	Remarks	Punches
Sales Visits 02-Oct-2023 to 08-Oct-2023	Shubham Sinha	TF0001			Gridh - Office	Digital Marketing Analyst Cum Developer	IT	Self, Shubham Sinha TF0001	Open		1	05-Oct-2023					Time: 14:20, Address: E-55, Sector 28, Gurugram, Haryana, 122022, Remarks: NA
Sales Visits 02-Oct-2023 to 08-Oct-2023	Shubham Sinha	TF0001									2	05-Oct-2023					Time: 14:21, Address: E-55, Sector 28, Gurugram, Haryana, 122022, Remarks: NA
Sales Visits 02-Oct-2023 to 08-Oct-2023	Shubham Sinha	TF0001									3	05-Oct-2023					Time: 14:36, Address: 585R-7JH, Gridh, Dukhiya mahadev road, Jharkhand, 815301, Remarks: Order 2 tons lmt and give 2lakh cheque
Sales Visits 02-Oct-2023 to 08-Oct-2023	Prince Kumar	TF0011			Gridh - Office	S.O	Sales	Self, Prince Kumar TF0011	Open		1	06-Oct-2023	Laich & Mahto				Time: 21:31, Address: F3GG+H32, Sector 28, Gurugram, Haryana, 122022, Remarks: NA
Sales Visits 02-Oct-2023 to 08-Oct-2023	Prince Kumar	TF0011									2	07-Oct-2023	Adarsh Enterprises Rangrahn				Time: 11:20, Address: 585R-7JH, Gridh, Dukhiya mahadev road, Jharkhand, 815301, Remarks: Order for 2 tons
Sales Visits 09-Oct-2023 to 15-Oct-2023	Shubham Sinha	TF0001			Gridh - Office	Digital Marketing Analyst Cum Developer	IT	Self, Shubham Sinha TF0001	Open								
Sales Visits 09-Oct-2023 to 15-Oct-2023	Prince Kumar	TF0011			Gridh - Office	S.O	Sales	Self, Prince Kumar TF0011	Open		1	10-Oct-2023	Amit Kz Singh				Time: 14:50, Address: 585R-7JH, Gridh, Dukhiya mahadev road, Jharkhand, 815301, Remarks: order
Sales Visits 09-Oct-2023 to 15-Oct-2023	Prince Kumar	TF0011									2	10-Oct-2023	Amit Kz Singh			Not ordered	Time: 11:16, Address: 585R-7JH, Gridh, Dukhiya mahadev road, Jharkhand, 815301, Remarks: NA
Sales Visits 09-Oct-2023 to 15-Oct-2023	Prince Kumar	TF0011									3	10-Oct-2023	Govind Traders	TMT REBAR	2.00	He order 2 tons	Time: 11:18, Address: 585R-7JH, Gridh, Dukhiya mahadev road, Jharkhand, 815301, Remarks: NA
Sales Visits 09-Oct-2023 to 15-Oct-2023	Prince Kumar	TF0011									4	10-Oct-2023	Amit Kz Singh			He will discuss everything with boss.	Time: 11:21, Address: 585R-7JH, Gridh, Dukhiya mahadev road, Jharkhand, 815301, Remarks: NA
Sales Visits 09-Oct-2023 to 15-Oct-2023	Prince Kumar	TF0011									5	11-Oct-2023	Amit Kz Singh			Discuss with owner and he is ready to mak payment of 2 lakh at 22 oct 2023.	Time: 17:34, Address: 585R-7JH, Gridh, Dukhiya mahadev road, Jharkhand, 815301, Remarks: NA
Sales Visits 09-Oct-2023 to 15-Oct-2023	Prince Kumar	TF0011									6	12-Oct-2023	Govind Traders	TMT REBAR	2.00	Ordered and given cheque for that	Time: 14:29, Address: 585R-7JH, Gridh, Dukhiya mahadev road, Jharkhand, 815301, Remarks: NA, Time: 14:29, Address: 585R-7JH, Gridh, Dukhiya mahadev road, Jharkhand, 815301, Remarks: NA
Sales Visits 09-Oct-2023 to 15-Oct-2023	Prince Kumar	TF0011									7	12-Oct-2023	Govind Traders	TMT REBAR	2.00	Ordered and given cheque for that	Time: 14:29, Address: 585R-7JH, Gridh, Dukhiya mahadev road, Jharkhand, 815301, Remarks: NA, Time: 14:29, Address: 585R-7JH, Gridh, Dukhiya mahadev road, Jharkhand, 815301, Remarks: NA