

PART 1:

Getting Started with ClickTime

Easy Time Tracking. Powerful
Budgeting and Staffing Tools.

ClickTime Basics

» Part 1. Getting Started

- a. Clients
- b. Projects
- c. Tasks
- d. People

Part 2. Using the ClickTime Timesheet

Part 3. ClickTime Time Entry Settings

Part 4. ClickTime Company Settings

Getting Started with ClickTime!

A powerful tool to help you run your business!

If you are interested in learning more about ClickTime, you've come to the right place!

These Getting Started documents are intended for prospective customers and anyone who is currently taking advantage of our free trial. They may also be helpful for someone who has started to use ClickTime in an Administrative capacity for an organization that is already a ClickTime customer.

In addition to this documentation, we have a first-class Sales and Support Team who are here to make sure that your experience with ClickTime is a success!

- If you've recently signed up for a trial and would like a demo or wish to speak with an Account Executive, please email sales@clicktime.com.
- Current ClickTime customers can always contact our Support Team at support@clicktime.com (or by calling +1 415-684 - 1180, option #3) with any questions, feedback, or comments.

Let's dive into setting up and using ClickTime!

Getting Started

Set up your Timesheet options for success!

Client	Project	Task	Sun Nov 15	Mon Nov 16	Tue Nov 17	Wed Nov 18	Thu Nov 19	Fri Nov 20	Sat Nov 21	Total
Adidas Shoes	Adidas Event	Administration		2.00	2.00	1.00		1.00		6.00
BMW	2015 Re-Brand	Design		1.00	3.00	5.00	4.00	1.00		14.00
Acme Internal	Charity Initiatives	Design		3.00	1.00	1.00	4.00	1.00		10.00
Apple	Airport Extreme Web A	Administration		1.00	2.00	1.00		1.00		5.00
Amazing Enterprises	Best Product Ever	Meetings		1.00				4.00		5.00
Select a client	Select a client first	Administration								0.00
Add Rows										
Time Off										
Select a Leave Type										0.00
Add Row										
			0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00

This timesheet is: **Open** [\[submit for approval\]](#) Save

The ClickTime Timesheet:

Above, you'll see an example of a Timesheet your employees will be using to track time with ClickTime! Before they can enter time, there's just a few things we need to set up.

- **Clients**

The Clients column is the primary organizing method for the timesheet. This term is customizable, so your organization may have decided to instead label this column as *Customers*, *Funding Sources*, *Cost Center*, etc. Each Client must have at least one Project created before you can log time to that Client.

- **Projects**

Projects must be associated with a Client and allow you a more specific method of time-tracking. This term is customizable and may display as *Jobs*, *Cases*, *Matters*, *Programs*, etc.

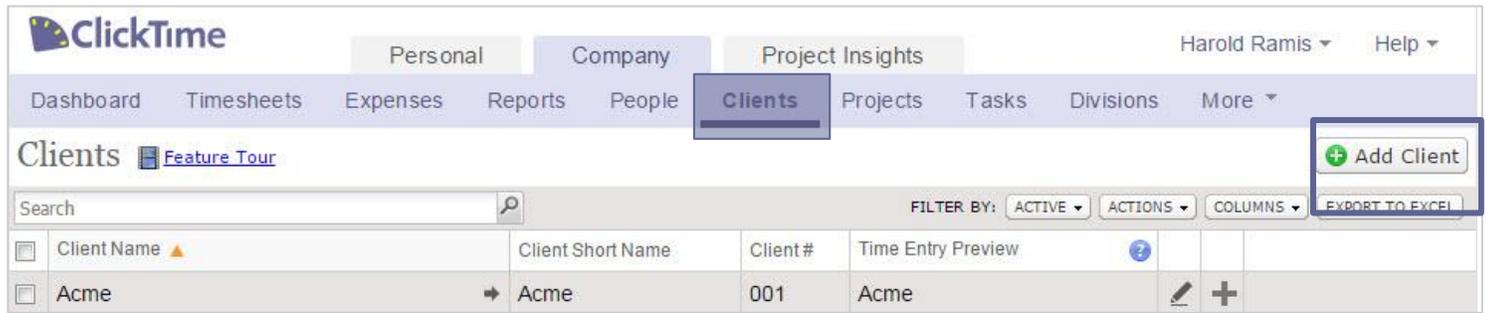
- **Tasks**

Tasks are used to track the type of work you perform on a Project. By default, Tasks are not connected to Clients or Projects. This term is also customizable and may display as *Activities*, *Functions*, *Services*, *Work Codes*, etc..

Tip: Customizing your terminology can be done at any time from the Company → Preferences page. We'll cover this in the "ClickTime Company Settings" guide.

Getting Started - Clients

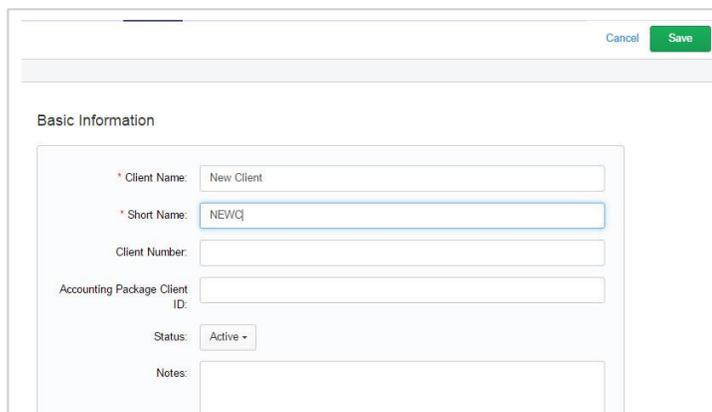
Creating Clients is the first step to setting up your ClickTime account.



The screenshot shows the ClickTime web interface. At the top, there are navigation tabs for 'Personal', 'Company', and 'Project Insights'. Below these are menu items: 'Dashboard', 'Timesheets', 'Expenses', 'Reports', 'People', 'Clients' (highlighted), 'Projects', 'Tasks', 'Divisions', and 'More'. A search bar is present. On the right, there are filters for 'ACTIVE', 'ACTIONS', and 'COLUMNS', along with an 'EXPORT TO EXCEL' button. A red box highlights the '+ Add Client' button in the top right corner.

Add a Client

Clients are the primary organizing entity in ClickTime. Before we can track time, we need some Clients and Projects to log the hours to. From the Company → Clients page, click “Add Client” to add your Clients.



The screenshot shows the 'Add Client' form. It has a 'Cancel' button and a green 'Save' button. The form is titled 'Basic Information' and contains the following fields:

- * Client Name: New Client
- * Short Name: NEWC
- Client Number: (empty)
- Accounting Package Client ID: (empty)
- Status: Active -
- Notes: (empty)

Create a Client

- It is required that you enter a unique Client Name and Short Name.
- If you need to assign the Client a number, please indicate that as well.
- The Accounting Package Client ID is for your own internal purposes.
- Make sure that the Status is kept to Active.
- Add any Notes if needed.
- Click Save to add the Client to the database.

Success!

After Saving, you'll be returned to the Clients page and will see a confirmation that your Client has been added successfully. Before we can log time to this Client, we'll need to create at least one Project in the next step.



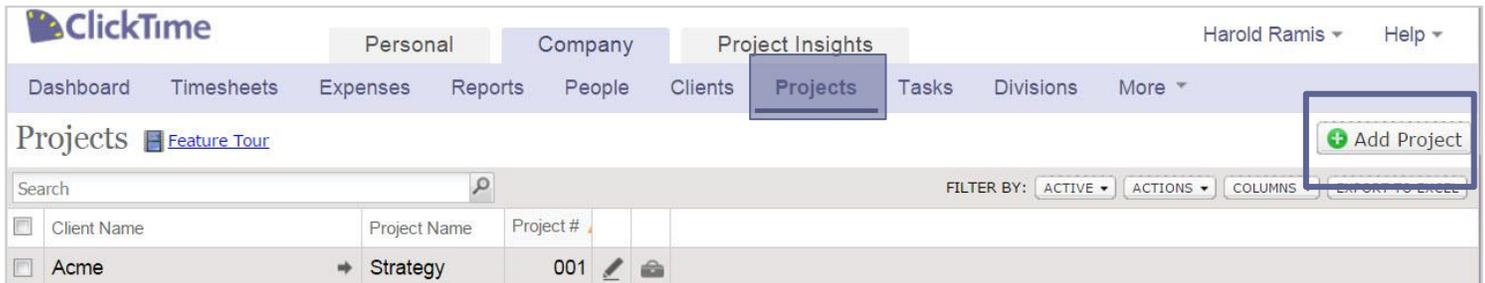
The screenshot shows the ClickTime web interface after a new client has been added. A green notification bar at the top says 'New Client was added successfully at 04:35:11 PM'. The 'Clients' table now includes the following entries:

Client Name	Client Short Name	Client #		
New Client	NEWC			
Virtucom	VIR	003		
Makers	MAKE	004		

The 'New Client' row is highlighted with a red box.

Getting Started - Projects

Create Projects for your Clients for accurate time tracking.



Add a Project

Each Project you work on for a Client must exist in ClickTime. Go to Company → Projects and choose to “Add Project”.

The screenshot shows the 'Create a Project' form. At the top right, there are 'Cancel' and 'Next' buttons. The form is titled 'Basic Information'. It contains several fields: 'Client' (a dropdown menu with 'New Client' selected), 'Project Name' (a text input field with 'New Project' entered), 'Project Number' (a text input field with '001' entered), 'Accounting Package' (a text input field), 'Project ID' (a text input field), 'Status' (a dropdown menu with 'Active' selected), and 'Notes' (a text area). The 'Project Name' and 'Project Number' fields are highlighted with a blue border.

Create a Project

- Select a Client from the drop-down menu
- Enter the name of your new Project.
- You'll also need to enter a Project Number (which can be anything you chose).
- The other fields can be left empty for now and entered at any time. We'll cover those options in more detail soon.
- Make sure the Status is kept as Active.
- Click Save, or Save and add Next" if you have more Projects to create.

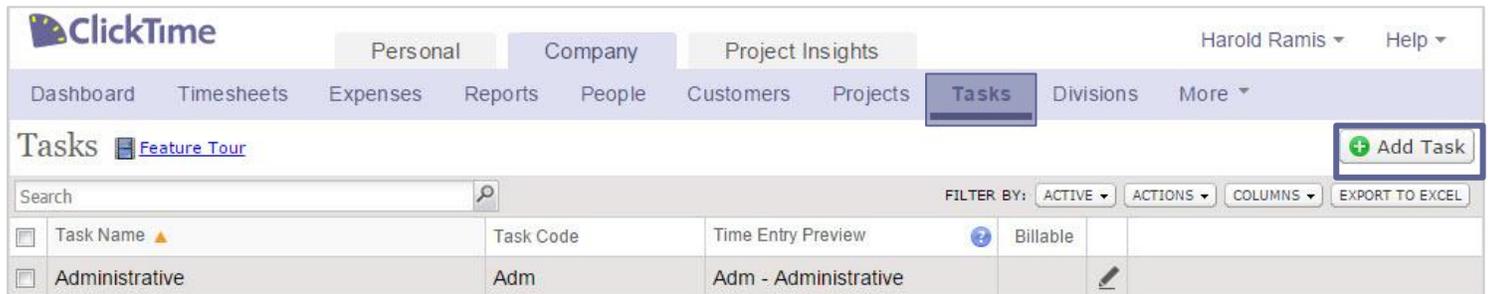


Success!

After Saving, you'll be returned to the Projects page and will see confirmation that your new Project Client has been added successfully. At this point you should be able to start tracking time, but we're going to discuss Tasks before moving on to the timesheet.

Getting Started - Tasks

Tasks help you track the specific work you do for each Project



The screenshot shows the ClickTime interface with the 'Company' tab selected and the 'Tasks' sub-tab active. A table lists existing tasks, including 'Administrative'. A red box highlights the '+ Add Task' button in the top right corner.

Task Name	Task Code	Time Entry Preview	Billable
Administrative	Adm	Adm - Administrative	

Add a Task (or not...)

While choosing a Task is required to create a time entry, ClickTime will automatically create a list of the most commonly used Tasks in your new account. These can be viewed from the Company → Tasks page. If there's a Task you and your staff regularly perform that is not included, click "Add Task" to create Tasks that meet your business need.



The 'New Task' form contains the following fields:

- task name: New Task
- task code: NEWT (suggested 3-5 characters)
- accounting package task ID: [empty]
- billable: billable (dropdown)
- status: active (dropdown)

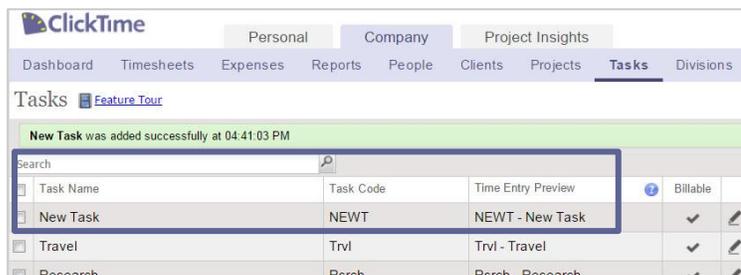
Buttons: Cancel, Save, Save & Add Next.

Create a Task

- Enter the name of the new Task.
- Assign the Task an internal Task Code.
- Make sure the Status is kept as Active
- Click "Save" or "Save and Add Next".

Success!

After Saving, you'll be returned to the Clients page and will see confirmation that your Client has been added successfully. Before we can log time to this Client, we'll need to create at least one Project in the next step.

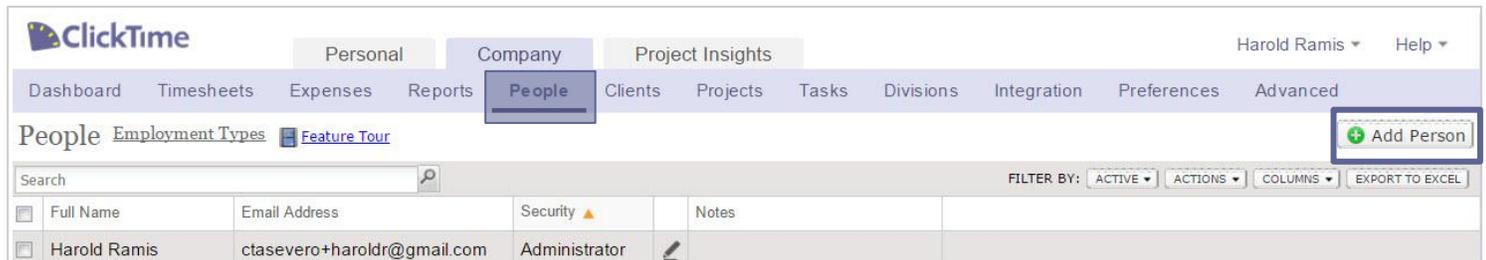


A green confirmation message states: "New Task was added successfully at 04:41:03 PM". Below it, the task table is updated with a new entry: "New Task" with code "NEWT" and preview "NEWT - New Task".

Task Name	Task Code	Time Entry Preview	Billable
New Task	NEWT	NEWT - New Task	✓
Travel	Trvl	Trvl - Travel	✓
Research	Resrch	Resrch - Research	✓

Getting Started - People

Employees need access before they can start tracking time



Add a Person

Your staff will need to be set up in ClickTime before they can start using a Timesheet. From the Company → People page, click “Add Person” to set them up in the system.

1. Person Details

Basic Information

* Full Name:

* Email Address:

Status:

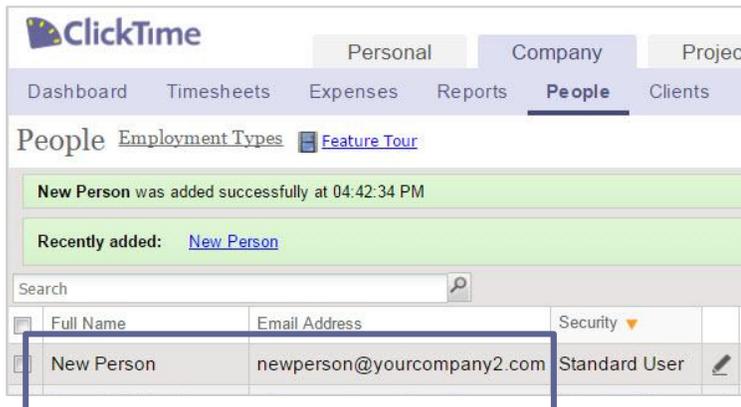
Start Date:

Create a Person

- The Full Name and Email Address field are required to give your employee access
- Other aspects of their account can be set up now or later. These include
 - Timesheet Settings,
 - Time Off Balances,
 - Other settings
- Indicate the level of permission they should have when accessing the system.
- Save person details

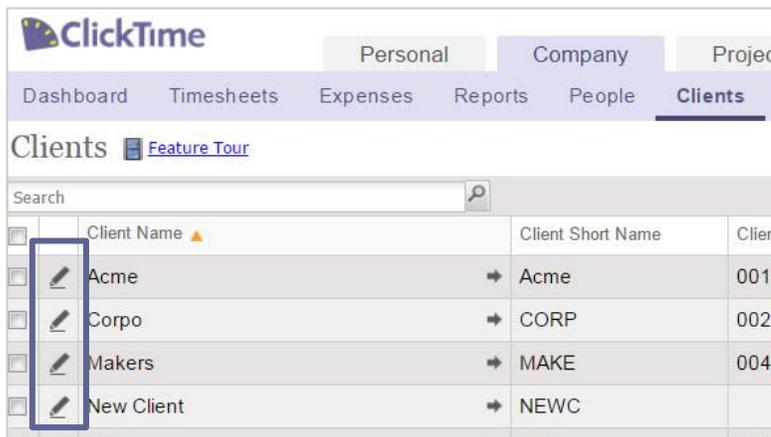
Success!

After Saving, you'll be returned to the People page and will see confirmation that your employee has been added successfully. Unless you have told the system not to, the employee will automatically receive an email with first-time login instructions.



Just the Basics

ClickTime makes it easy to change your display preferences or make changes to these items

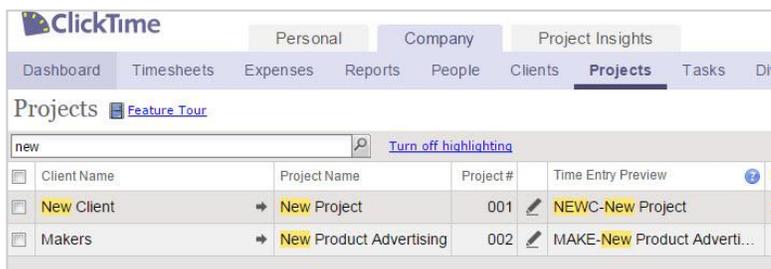


The screenshot shows the 'Clients' page in ClickTime. The navigation bar includes 'Personal', 'Company', and 'Project'. The main menu has 'Dashboard', 'Timesheets', 'Expenses', 'Reports', 'People', and 'Clients'. The 'Clients' page has a search bar and a table with columns: Client Name, Client Short Name, and Client ID. A red box highlights the pencil icon in the first column of the table.

Client Name	Client Short Name	Client ID
Acme	Acme	001
Corpo	CORP	002
Makers	MAKE	004
New Client	NEWC	

Edit Existing Clients/Projects/Tasks

To edit the Clients, Projects, or Tasks in your account, go to the appropriate Company page and click the “Edit” pencil icon. This will allow you to do things like update the Project name, set something to inactive, and much more. The edit pages will look very similar to the setup pages.



The screenshot shows the 'Projects' page in ClickTime. The navigation bar includes 'Personal', 'Company', and 'Project Insights'. The main menu has 'Dashboard', 'Timesheets', 'Expenses', 'Reports', 'People', 'Clients', 'Projects', and 'Tasks'. The 'Projects' page has a search bar and a table with columns: Client Name, Project Name, Project#, and Time Entry Preview. The table is sorted by the 'Time Entry Preview' column.

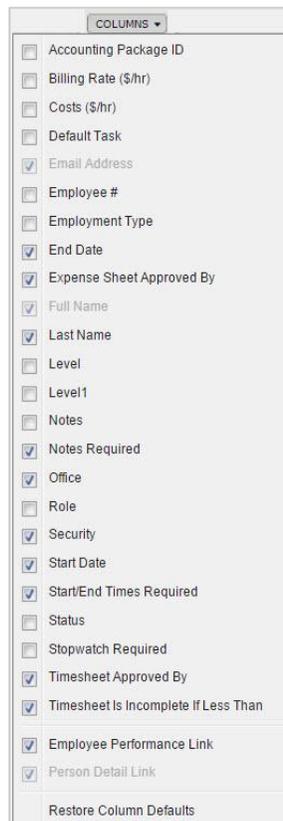
Client Name	Project Name	Project#	Time Entry Preview
New Client	New Project	001	NEWC-New Project
Makers	New Product Advertising	002	MAKE-New Product Adver...

Search and Sort

Use the “search” field to quickly find specific Clients, Projects, or Tasks. Click the column headers to sort by the data in that column. This example is sorted by the “Time Entry Preview” column.

Display Columns

If there is information about a Client, Project, or Task that is not displaying by default, use the “Columns” option to choose which columns should be displayed or hidden. The options that are greyed out are required for the page.



The screenshot shows the 'Columns' menu in ClickTime. It lists various columns that can be displayed or hidden. The 'Columns' dropdown is set to 'COLUMNS'. The list includes: Accounting Package ID, Billing Rate (\$/hr), Costs (\$/hr), Default Task, Email Address, Employee #, Employment Type, End Date, Expense Sheet Approved By, Full Name, Last Name, Level, Level1, Notes, Notes Required, Office, Role, Security, Start Date, Start/End Times Required, Status, Stopwatch Required, Timesheet Approved By, Timesheet Is Incomplete If Less Than, Employee Performance Link, and Person Detail Link. There is a 'Restore Column Defaults' button at the bottom.

Column Name	Checked
Accounting Package ID	<input type="checkbox"/>
Billing Rate (\$/hr)	<input type="checkbox"/>
Costs (\$/hr)	<input type="checkbox"/>
Default Task	<input type="checkbox"/>
Email Address	<input checked="" type="checkbox"/>
Employee #	<input type="checkbox"/>
Employment Type	<input type="checkbox"/>
End Date	<input checked="" type="checkbox"/>
Expense Sheet Approved By	<input checked="" type="checkbox"/>
Full Name	<input checked="" type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>
Level	<input type="checkbox"/>
Level1	<input type="checkbox"/>
Notes	<input type="checkbox"/>
Notes Required	<input checked="" type="checkbox"/>
Office	<input checked="" type="checkbox"/>
Role	<input type="checkbox"/>
Security	<input checked="" type="checkbox"/>
Start Date	<input checked="" type="checkbox"/>
Start/End Times Required	<input checked="" type="checkbox"/>
Status	<input type="checkbox"/>
Stopwatch Required	<input type="checkbox"/>
Timesheet Approved By	<input checked="" type="checkbox"/>
Timesheet Is Incomplete If Less Than	<input checked="" type="checkbox"/>
Employee Performance Link	<input checked="" type="checkbox"/>
Person Detail Link	<input checked="" type="checkbox"/>

Account Setup? Check.

Learn how to start tracking time now in
Part 2: Using the ClickTime Timesheet

Contact us at 415-684-1180 or email
sales@clicktime.com (demo accounts)
support@clicktime.com (current customers)