PART 1:

Getting Started with ClickTime

Easy Time Tracking. Powerful Budgeting and Staffing Tools.

282 Second Street. Fourth Floor, San Francisco, CA 94105
Phone: +1 415 684-1180

ClickTime Basics

» Part 1. Getting Started

a. Clients
b. Projects
c. Tasks
d. Divisions
e. People

Part 2. Using the ClickTime Timesheet

Part 3. ClickTime Time Entry Settings

Part 4. ClickTime Company Settings

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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!

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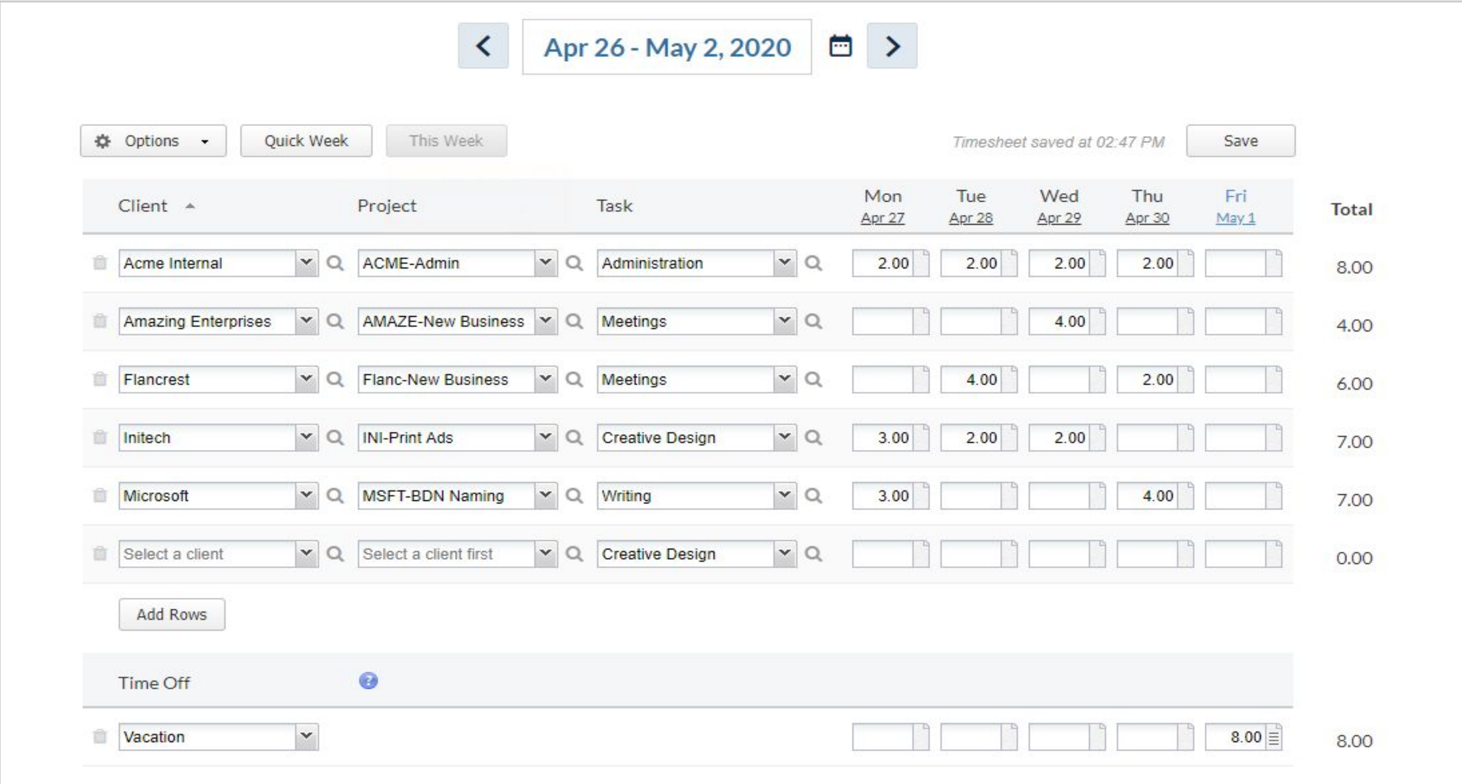
Getting Started

Set up your Timesheet options for success!



Apr 26 - May 2, 2020

Options | Quick Week | This Week | Timesheet saved at 02:47 PM | Save

Client	Project	Task	Mon Apr 27	Tue Apr 28	Wed Apr 29	Thu Apr 30	Fri May 1	Total
Acme Internal	ACME-Admin	Administration	2.00	2.00	2.00	2.00		8.00
Amazing Enterprises	AMAZE-New Business	Meetings			4.00			4.00
Flancrest	Flanc-New Business	Meetings		4.00		2.00		6.00
Initech	INI-Print Ads	Creative Design	3.00	2.00	2.00			7.00
Microsoft	MSFT-BDN Naming	Writing	3.00			4.00		7.00
Select a client	Select a client first	Creative Design						0.00

Add Rows

Time Off						
Vacation					8.00	8.00

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.

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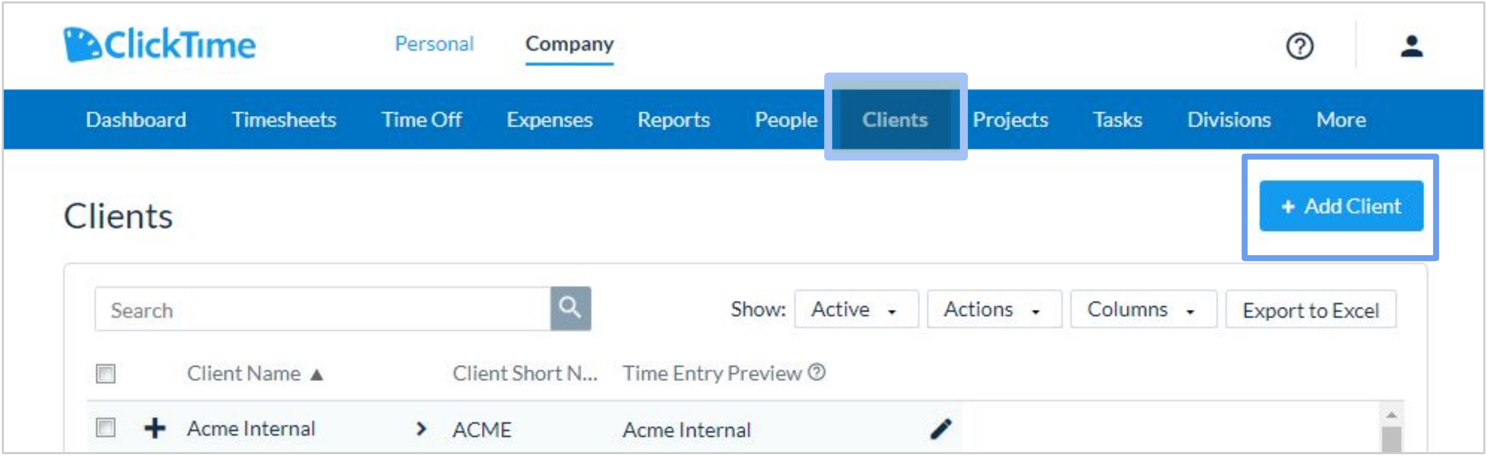
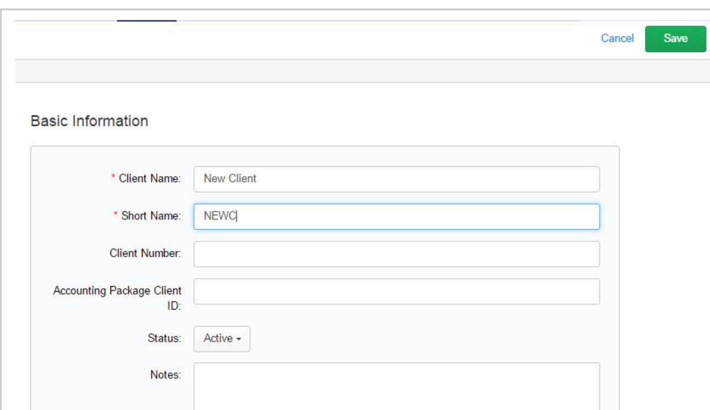
Getting Started - Clients

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



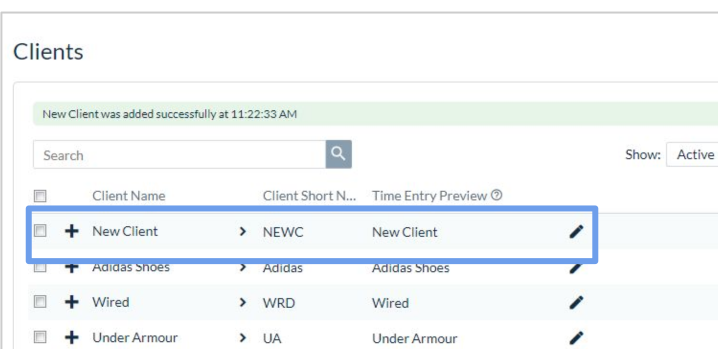
Add a Client

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.



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

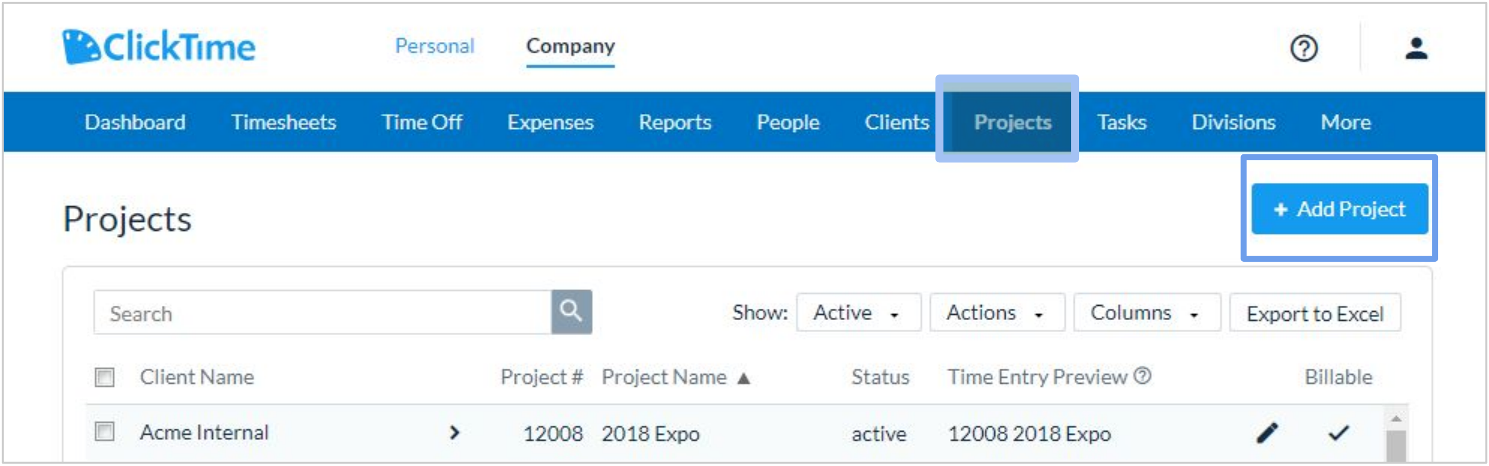


Success!

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.

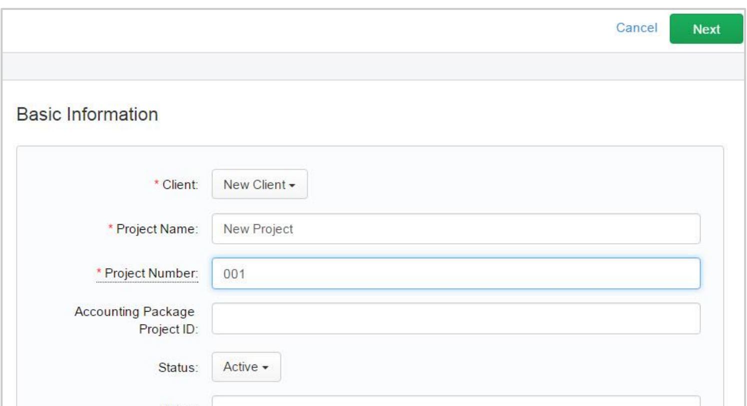
Getting Started - Projects

Create Projects for your Clients for accurate time tracking.



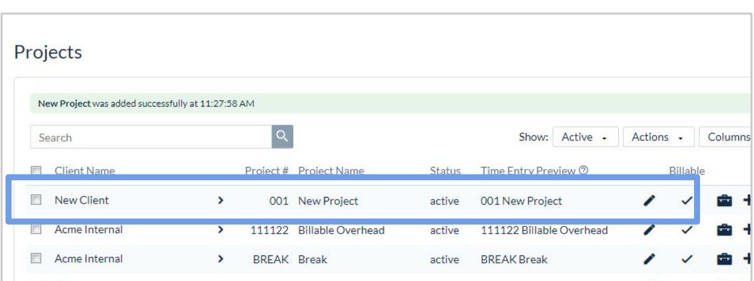
Add a Project

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



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.

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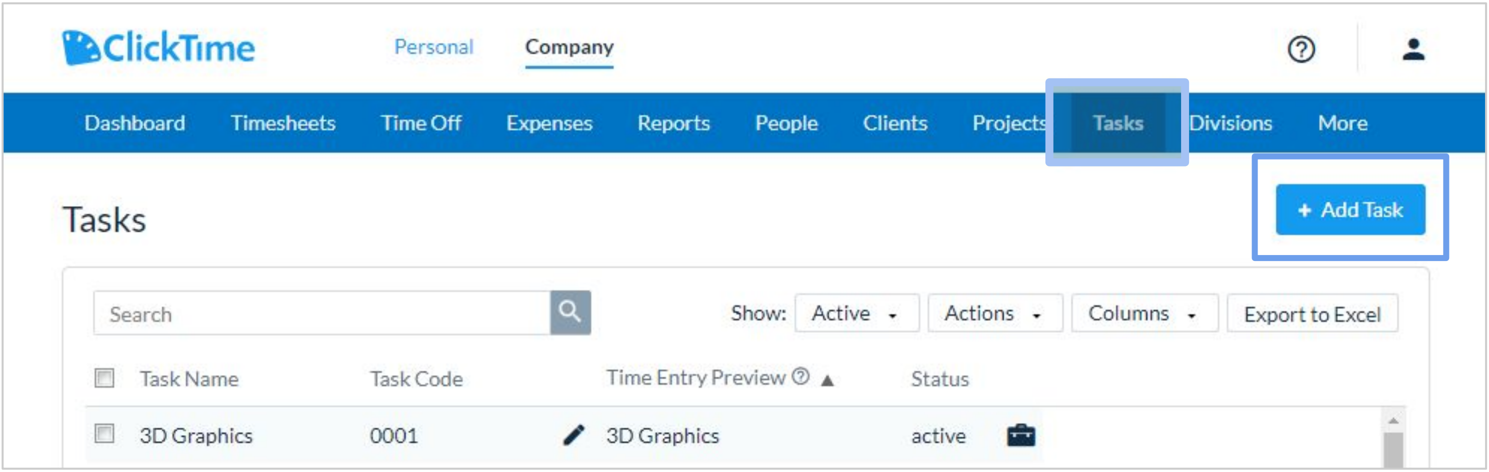
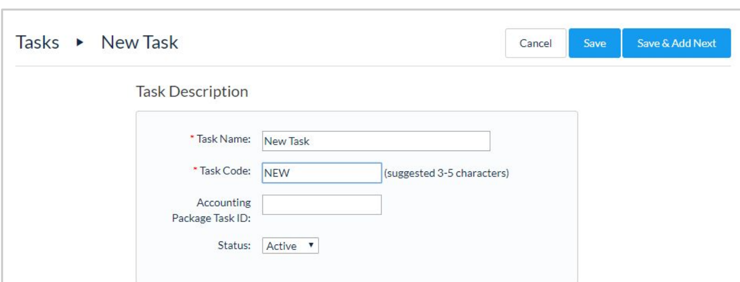
Getting Started - Tasks

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



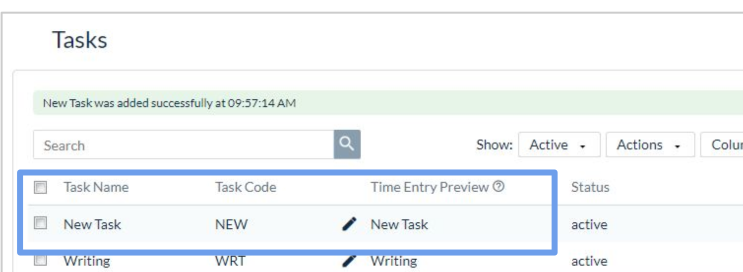
Add a Task (or not…)

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.



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.

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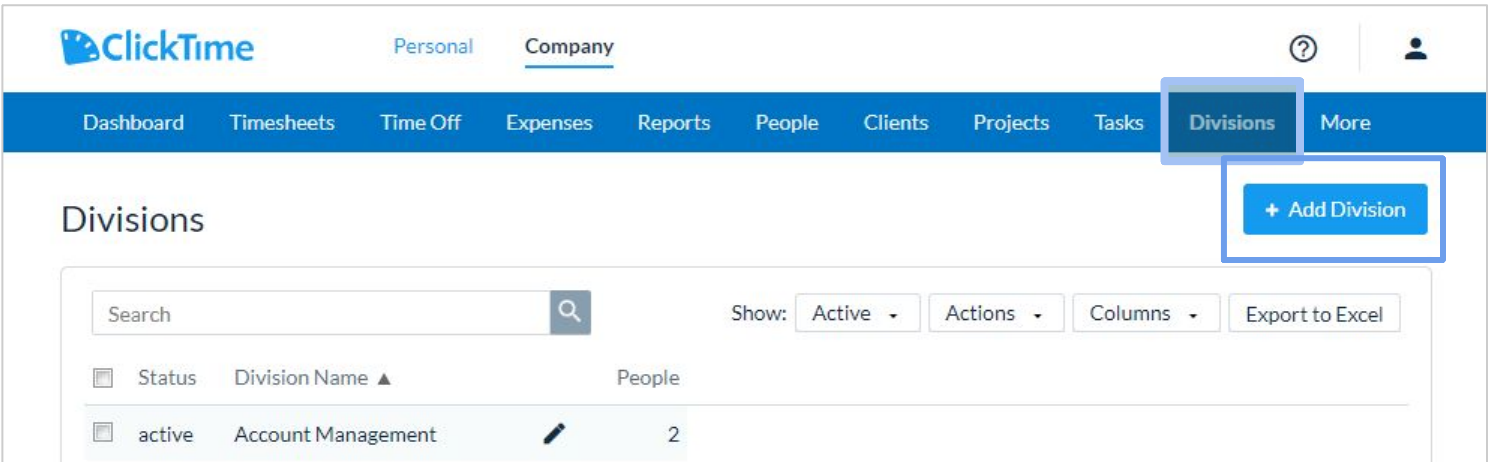
Getting Started - Divisions

Divisions can help you organize employees by team, location, supervisor, and more.

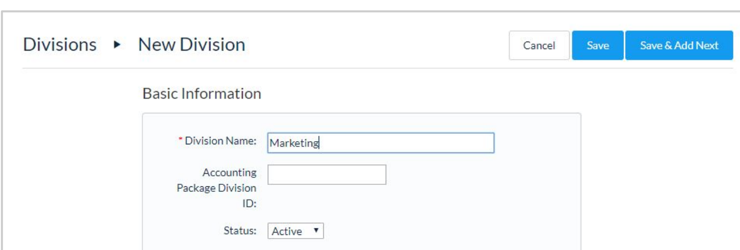
Divisions:

Divisions are an optional method to keep track of similar employees. This can be helpful when running reports or setting up Manager permissions so Managers only approve time for people in the Divisions they supervise. Like Clients, Projects, and Tasks, the term Division can also be customized. Other terms for Divisions include *Departments, Teams, Work Groups*, etc.



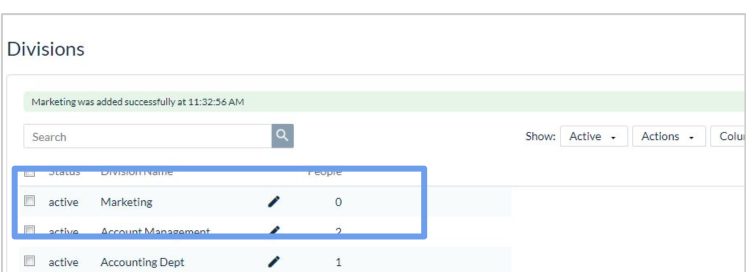
Add a Division

If you'd like to use the Divisions options, you'll need to create them first. Go to the Company → Divisions page and click "Add Division" to create a new Division.



Create a Division

- Enter the name of the new Division
- Make sure the Status is kept as Active
- Click "Save" or "Save and Add Next"



Success!

After Saving, you'll be returned to the Divisions page and will see confirmation that your Division has been added successfully. Next, you'll need to assign People to the Division from the Person Details pages, which we'll cover next.

Note: Divisions are available to demo customers and included in all subscriptions except for the "Starter" plan. If you activate a "Starter" plan, you will not see your Divisions without upgrading to a "Team" (or higher) plan.

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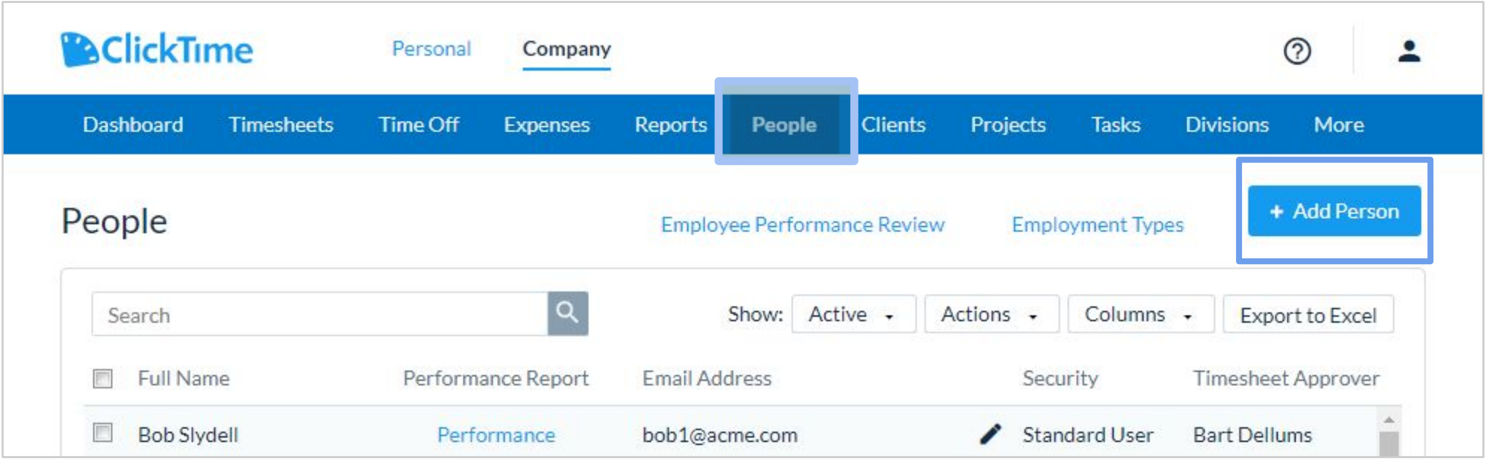
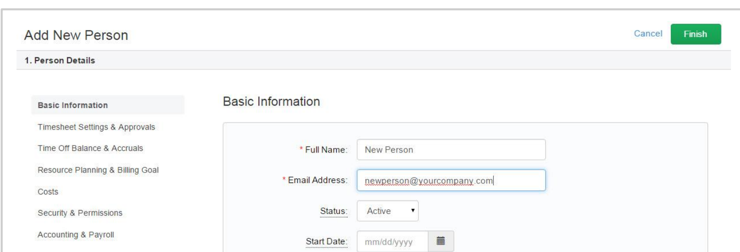
Getting Started - People

Employees need access before they can start tracking time.



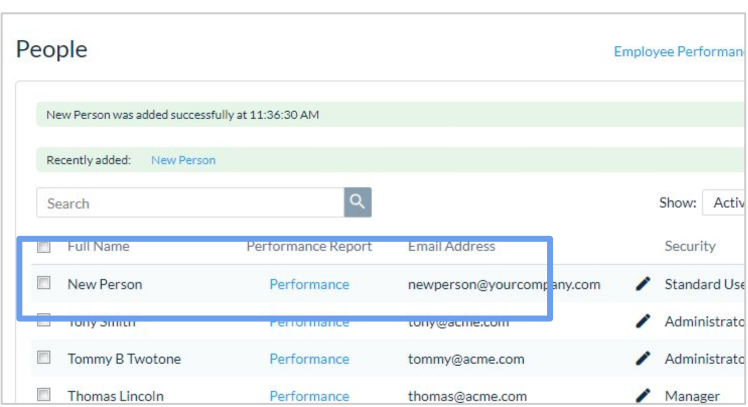
Add a Person

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.



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

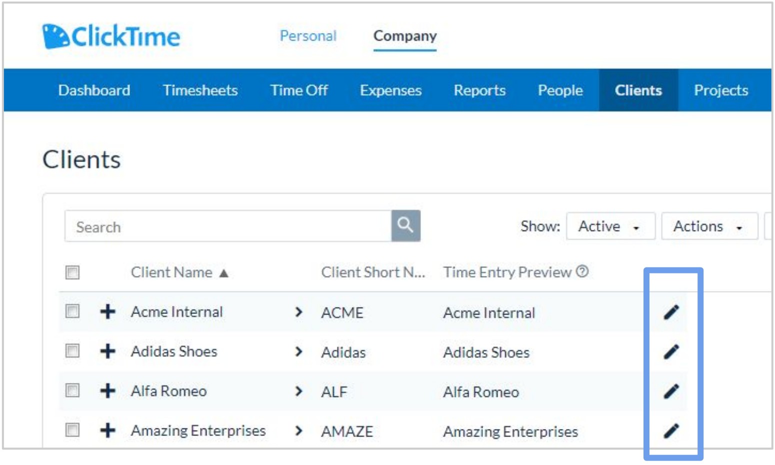


Success!

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

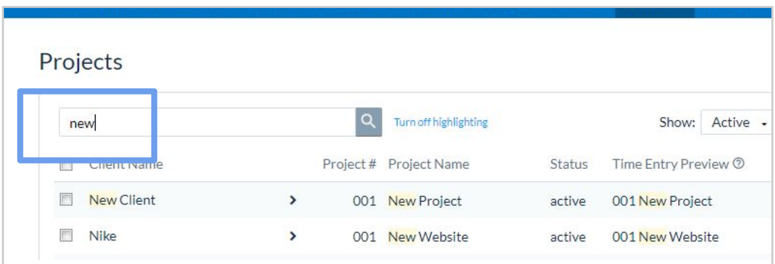
ClickTime makes it easy to change your display preferences or make changes to these items .



Edit Existing Clients/Projects/Tasks/Divisions

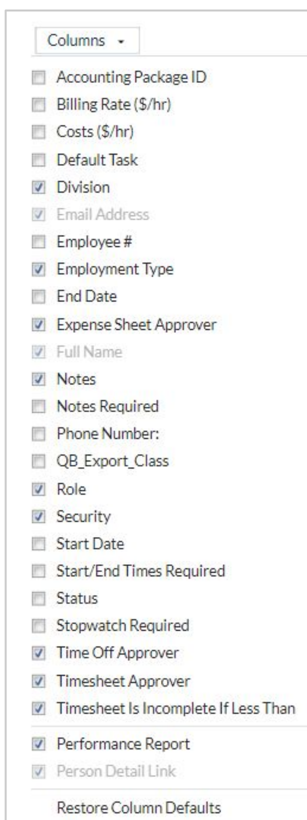
To edit the Clients, Projects, Tasks, or Divisions in your account, go to the appropriate Company page and either click the "Edit" pencil icon, or double-click anywhere in the row.

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.



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.

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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)

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