

PART 3:

ClickTime Time Entry Settings

Set up your Company-wide Time
Entry settings

ClickTime Basics

Part 1. Getting Started

Part 2. Using the ClickTime Timesheet

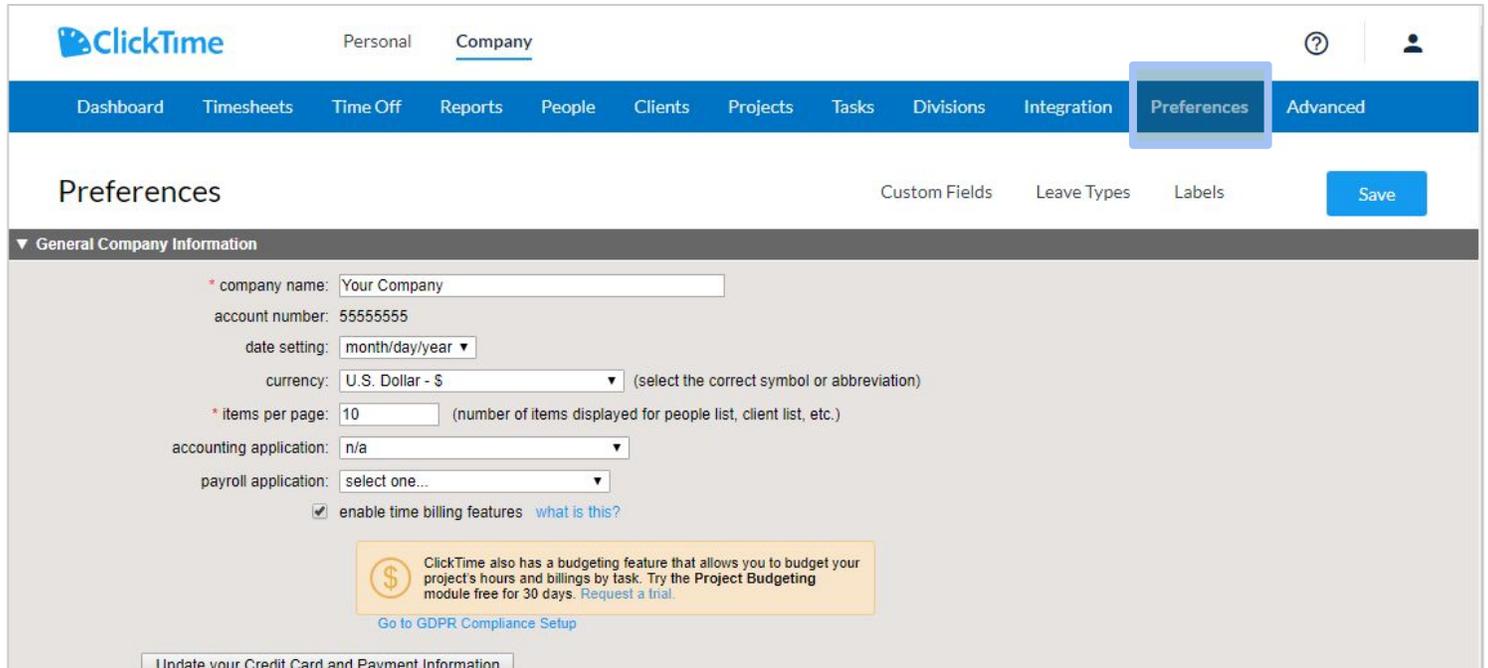
» Part 3. ClickTime Time Entry Settings

- a. General Company Information
- b. Timesheet & Expenses Information
- c. List Settings for Time Entry

Part 4. ClickTime Company Settings

General Company Information

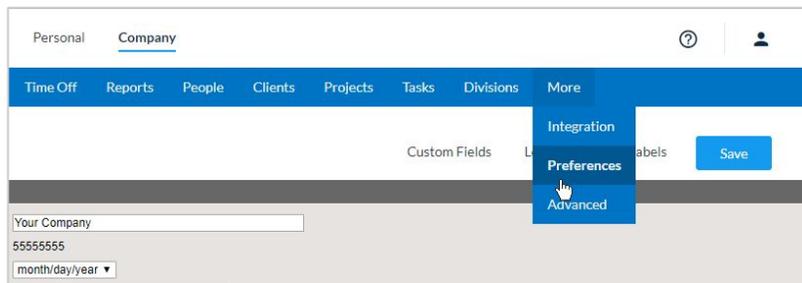
The first two sections of the Company Preferences page will allow you to set up your General Company Information and Timesheet model. These fields can be modified at any time, but will likely only need to be set up once.



The screenshot shows the ClickTime interface with the 'Company' tab selected. The 'Preferences' menu item is highlighted in the top navigation bar. Below the navigation bar, the 'Preferences' page is displayed with a 'Save' button. The 'General Company Information' section is expanded, showing various settings: company name (Your Company), account number (55555555), date setting (month/day/year), currency (U.S. Dollar - \$), items per page (10), accounting application (n/a), payroll application (select one...), and a checked box for 'enable time billing features'. A yellow callout box promotes a budgeting feature, and a link for 'Go to GDPR Compliance Setup' is visible. At the bottom, there is a link to 'Update your Credit Card and Payment Information'.

Now that you've set up your options for time entry and started tracking time, let's make sure that your general settings correctly match your business model (ClickTime is highly customizable to fit a variety of business models. This guide will help you make sure your ClickTime account is configured to your specific needs).

The Company Preferences page can be found when you are in the Company Section of your ClickTime account. These features can only be accessed by local ClickTime Administrators.



This screenshot shows the ClickTime navigation menu. The 'Company' tab is selected. The 'More' menu item is expanded, showing options for 'Integration', 'Preferences', and 'Advanced'. A mouse cursor is pointing at the 'Preferences' option. The background shows the top part of the 'General Company Information' form.

If you do not see the Preferences option, click "More" to see the rest of your choices, then select "Preferences".

General Company Information

▼ General Company Information

* company name: Your Company Name

account number: 2045347

date setting: month/day/year

currency: U.S. Dollar - \$ (select the correct currency for people list)

* items per page: [dropdown]

accounting application: U.S. Dollar - \$

payroll application: U.S. Dollar - USD

checking account name: Ugandan Shilling - USh

Ukrainian Hryvnia - ₪

Ukrainian Hryvnia - UAH

Company name is the name in our database. This will default to whatever you initially signed up with. Below is your unique Account Number. This information can be useful to identify yourself if you are discussing with any ClickTime staff.

Next, confirm that your date setting is correct, and then select your preferred currency. If you don't see your currency listed, please let our Support Team know so we can add it!

ClickTime Connector exports time and expenses to QuickBooks. ➔

1 payroll application: Access SelectPay

checking account name: Checking

2 enable time billing features [what is this?](#)

ClickTime also has a budgeting feature that allows you to budget your project's hours and billings by task. Try the Project Budgeting module free for 30 days. [Request a trial.](#)

[Go to GDPR Compliance Setup](#)

For additional help using ClickTime with QuickBooks, including best-practices and advice in setting up your accounts, contact our [Professional Services group](#).

3 [Update your Credit Card and Payment Information](#)

- 1 If you'd like to tell us which Accounting and Payroll applications you use, as well as the name of your checking account, that information will be useful as we look into future integrations. Note that if you use QuickBooks for accounting, you'll get a helpful link to download our QuickBooks Connector files.
- 2 ClickTime supports time billing options, which can be enabled here. We also support two different budgeting options for Premier+ plans. If you have any questions about using either option, please contact our Support Team.
- 3 If you need to update your Invoicing Method, Billing Contact Information, or Payment Method details, click the link here to be taken to the appropriate page.

Next you can set up your general **Timesheet and Expenses Information**.

Timesheet and Expense Information

▼ Timesheet and Expense Information

time increment:

lock date: (month/day/year) (time entries on or before this date will be read-only)

enable DCAA compliance [what is this?](#) (send email to support@clicktime.com to add this feature to your account)

mileage unit:

notify this person when an expense sheet is approved for payment:

Select the timesheet model for your company:

timesheet model: [what is this?](#)

week starts on: [what is this?](#)

First, choose the time increment you'd like to use for your timesheets. ClickTime supports the following increments:

- 1/10 hour (every 6 minutes)
- 1/4 hour (every 15 minutes)
- 1/2 hour (every 30 minutes)
- hourly (every 60 minutes)

ClickTime will round all time entries up or down to the nearest interval based on this rule.

lock date: (month/day/year) (time entries on or before this date will be read-only)

enable DCAA compliance [what is this?](#)

Below is the Company Lock Date. ClickTime will not allow any users to enter time entries before this date. It defaults to 1971, but you can update this at any time if you want to prevent your employees from creating new time entries in the past.

If you are a demo account with a government contract and need to be compliant with the Defense Contract Audit Agency (DCAA), please contact our Sales Team to enable the feature. If you are a current ClickTime customer who needs to start being compliant with DCAA guidelines, please reach out to our Support Team for more details.

Timesheet and Expense Information

mileage unit:

notify this person when an expense sheet is approved for payment:

Organizations with access to our Expenses Module will see the option to track distance traveled in either miles or kilometers. If you'd like a local ClickTime Administrator or Manager to be notified whenever an Expense Sheet has been approved for payment, you can set that here as well.

Select the timesheet model for your company:

timesheet model: [what is this?](#)

 [what is this?](#)

Next choose your timesheet model (the length of each timesheet period). This does not necessarily have to be the same as your pay period. ClickTime supports Weekly, Biweekly, semi-monthly, monthly and some custom timesheet models.

Select the timesheet model for your company:

timesheet model: [what is this?](#)
number of days per timesheet: [what is this?](#)
week starts on: [what is this?](#)
next timesheet starts on: [what is this?](#)

Then indicate which day of the week your timesheet starts on. If you are changing your timesheet model, you may be asked which day to start this new model on. Selecting the "Custom" option will require you to specify the number of days you have in each timesheet period.

Note If you change your timesheet model after creating time entries, those time entries will not be changed. However, if you used the "Lock" or "Approve" functions for any timesheets, the history of those actions will be removed and will no longer be accessible. You will probably want to go back and re-lock or re-approve those timesheets after making the change.

List Settings for Time Entry

ClickTime time entry options can be set up in a variety of ways

▶ Project List Settings

▶ Task List Settings

▶ Leave Type List Settings

Collapsed List Settings

Next you will see options for Project, Task, and Leave Type List Settings. These options allow you to set up ClickTime so that users will only have certain options to select when they enter time. Click the arrow to expand each section of the page.

▼ Project List Settings

include "non-allocated" option in project list - for web time entry

* project list width: (between 10-200) - for Day View web entry

If you need additional levels (phase, sub-phase, etc.) for tracking your time, contact [support](#).

Project List Controls [what is this?](#)

None - allow everyone to see all active projects. Each person manages his/her own list via "My Projects."

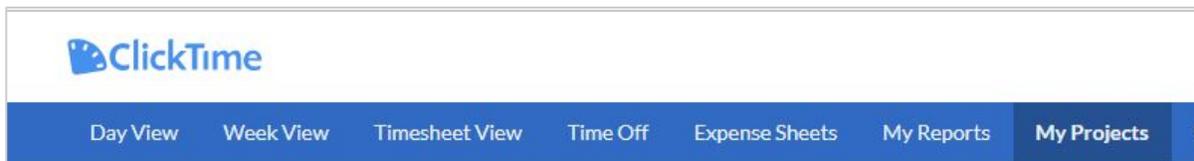
Moderate - control which projects are visible to each division.

Maximum - control which projects are visible on a person-by-person basis.

Project List Settings

In Project List Settings, we recommend un-checking the "include non-allocated option" section, unless you have a need to let users log time to projects that have not yet been created.

The Project List Controls allow you to create rules so that your employees can only access those Projects that they need to log time to. If you leave this set to **None**, each user will be able to access all active Projects, but can manage their own list using their own My Projects screen.



The **Moderate** option allows you to set Project Availability by the Division a person works in. We'll cover Division settings in more detail in a later guide.

The **Maximum** option will let you set Project Availability on a Person-by-Person basis.

If you are using these controls, you can either set up Project Availability from the Project Detail page, the Division Detail page (when set to Moderate) or the Person Detail page (when set to Maximum).

List Settings for Time Entry

ClickTime time entry options can be set up in a variety of ways

▼ **Task List Settings**

* task list width: (between 10-200) - for Day View web entry

If you need additional levels (sub-task, etc.) for tracking your time, contact [support](#).

Task List Controls [what is this?](#)

None - allow everyone to see all active tasks. Each person manages his/her own list via "My Tasks."

Client/Project - control which tasks are visible based on the client or project selected.

The Task List Settings allow you to give users access to all active Tasks (none), or set it so that the Tasks options are tied to the Client or Project used. When these are turned off, your staff can set their own Task Availability using the "My Tasks" page.

Projects

Search

<input type="checkbox"/> Client Name	Project Name ▲	Project #	
<input type="checkbox"/> Acme Internal	> 2019 Expo	2019EXPO	
<input type="checkbox"/> Amazing Enterprises	> 2019 Market Research	2019MKT	
<input type="checkbox"/> Initech	> 2019 Rebrand	REBRD	

When turned on, you will see a "toolbox" icon on the Project and Task List view pages, which will take you to the "Task Availability" section of ClickTime.

Note Project and Task List Settings are available to Team plans and above. All ClickTime demo accounts are configured for the Premier plans - all features will remain and available throughout your trial. If after converting to a ClickTime customer you choose the "Starter" account type, the advanced Project and Task List Settings features will no longer be available.

▼ **Leave Type List Settings**

Leave Type List Controls [what is this?](#)

None - All people have access to all leave types.

Employment Type - Control which leave types are available to each person by their [employment type](#).

Next, the Leave Type List Controls setting determines if all active leave types are available to all users (None), or if the options will depend on the type of employee.

ClickTime Personal Company

Dashboard Timesheets Time Off Expenses Reports People Clients Projects Tasks Division

Preferences Custom Fields **Leave Types** Labels Currencies

▼ General Company Information

To edit your leave types, use the "Leave Types" link at the top of the Company Preferences page.

Time Entry Settings. Optimized.

To finish your setup, please see
[Part 4: ClickTime Company Settings](#)

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