



TaskTime³

Project timing and billing made easy

User's Guide

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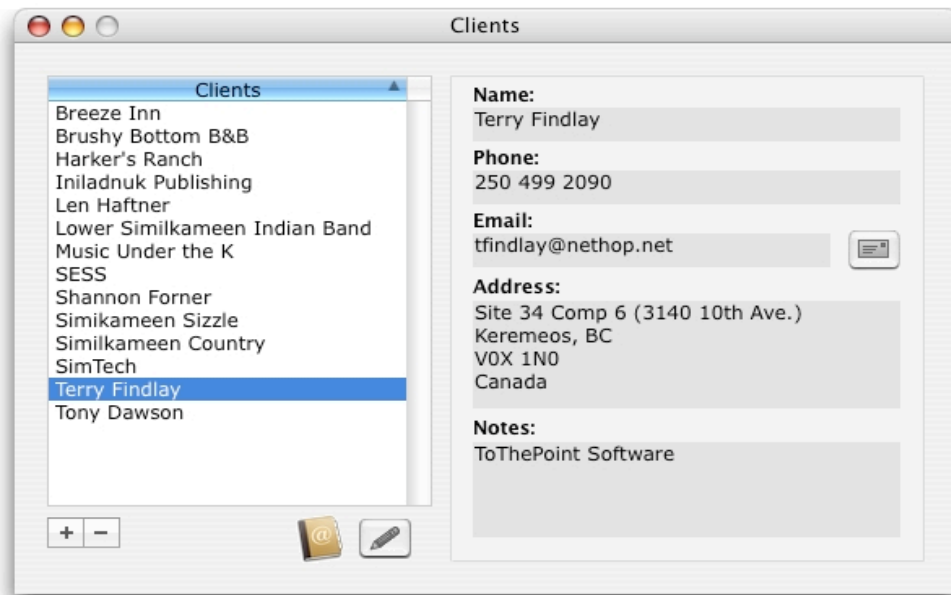
Introduction



TaskTime3 makes keeping track of time spent on multiple client projects easy and efficient. With TaskTime3 you can track any number of clients and any number of projects for each client.

- ✓ Since you can have more than one project open at a time it is easy to switch between projects on the fly.
- ✓ Tracking expenses has never been easier. Each expense item can have an individual tax rate.
- ✓ Keep project specific notes of any length and detail.
- ✓ Set a separate currency symbol on a project-by-project basis.
- ✓ Track the status of each project.
- ✓ Use the Project Manager to add, delete, rename, and store projects.
- ✓ Link documents, applications, folders, and web/email addresses to any project.
- ✓ Minimize project windows to a small, floating timer controller window.

Getting Started

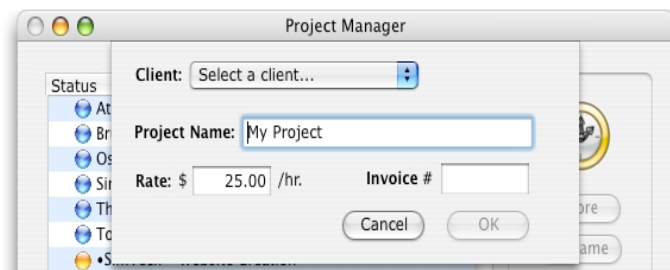


The first thing you will need to do in order to use TaskTime3 is add at least one client.

Choose Manage Clients under the File menu to bring up the Clients window. To add your first client click the “+” button under the Clients list. In the sheet that drops down fill in a client’s name. If desired, you can also fill in the rest of the client information but only the name field must be filled in. Click the Add button. When you are finished adding clients, you can close the Clients window.

Under the File menu choose New Project. The Project Manager window will appear and the New Project sheet will be shown. Select a client using the popup menu. Enter a project name and the rate that you will be charging the client for your work on the project. Click OK.

The Project Sessions window will then open and the New Project sheet will drop down.

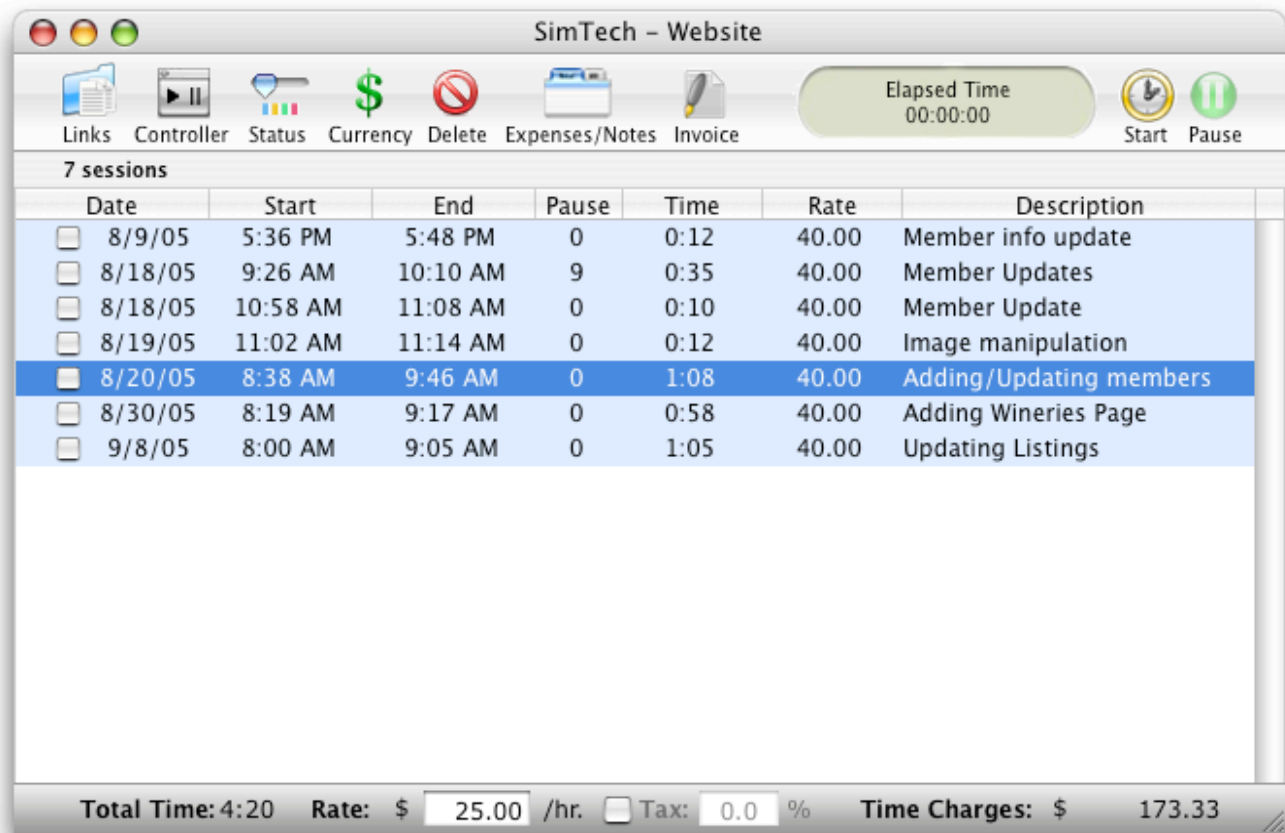


Select a client in the popup menu. Enter a name for the project. Enter a rate for the project. If desired, enter an invoice number.

NOTE: If you have activated AutoNumbering in the Preferences the invoice field will have been filled in automatically.

NOTE: You can edit the default rate on the project window when it opens. You can also set session by session rates on the project window.

The Project Sessions Window



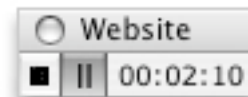
Running A Session

To start a session click the clock button. The icon will change to a stop icon. You can pause and resume a session using the pause button. Click the stop icon to stop a session.

The Other Toolbar Buttons

The Links Button - opens and closes the Resource Links drawer. In the Resource Links drawer you can add links to documents, applications, folders, and web/email addresses. To add a link to an item drag its icon to the list area of the drawer or click the "+" but to navigate to the item.

NOTE: To enter more detailed information for a session, command-click on the session to bring up the session's Notes window. If notes exist for a session, the description text for that session will be *italicized*.



The Controller Button - switches to the controller window. To switch back to the full Sessions window just close the controller window.

The Status Button - opens the Status sheet where you can set the status of a project to:

- In Progress (blue indicator)
- Invoice Sent (orange indicator)
- Paid (green indicator)
- Overdue (red indicator)

The Project Sessions Window (continued)

The Currency Button - opens the Currency sheet where you can set a project specific currency symbol. If none is set the default currency symbol (set in the Preferences) will be used.

The Delete Button - deletes a selected session. Running or paused sessions must be stopped before they can be deleted.

The Expenses/Notes Button - opens and closes the Expenses/Notes drawer. You can set which tab (Expenses or Notes) is displayed when this drawer opens in the Defaults tab of the Preferences window.

THE CHECK BOXES - use the check boxes to indicate if a session has been billed or not (ie. if an invoice has been set for the session). Sessions marked as billed will not be included in subsequent invoices.

Tracking Expenses

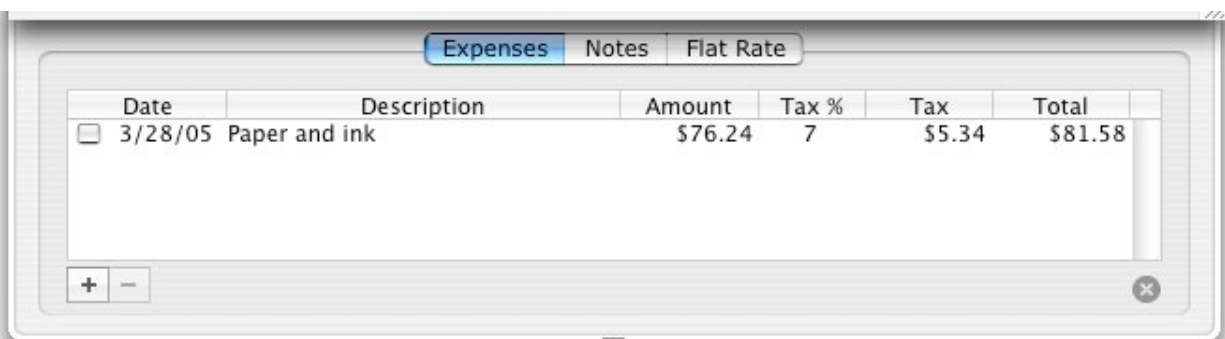
Access the Expenses, Notes and Flat Rate drawer by clicking the icon in the toolbar.

To add an expense click the “+”. The Expenses sheet will appear. Enter a description and amount for the expense. If desired, enter a tax amount for the expense. Click OK.

To edit an expense click in the Description, Amount, or Tax column of the item to be edited.

Tracking Flat Rate Items

Flat rate items are any items that are billed by a fixed amount rather than by the amount of time spent on the item.



Access the Expenses, Notes and Flat Rate drawer by clicking the icon in the toolbar.

To add a flat rate item click the “+”. A new item with the current date will be added to the list. Enter the Description and Amount for the new item

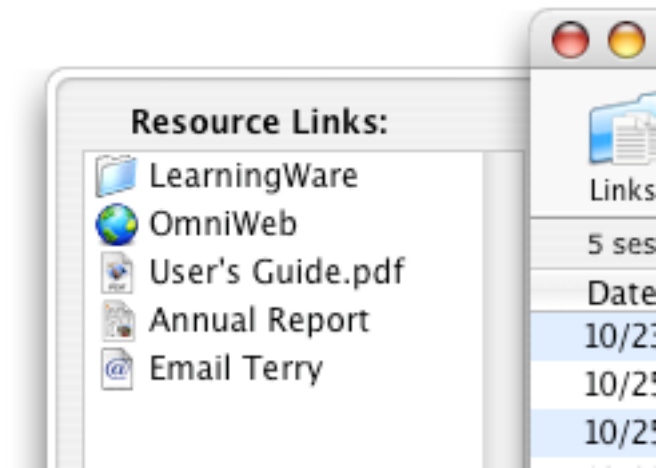
To edit an expense click in the Date, Description, or Amount column of the item to be edited.

Linking to Resources

Each project can have links to documents, folders, applications and web address.

To create a link drag the item's icon to the Resource Links list or use the "+" button to navigate to the desired item.

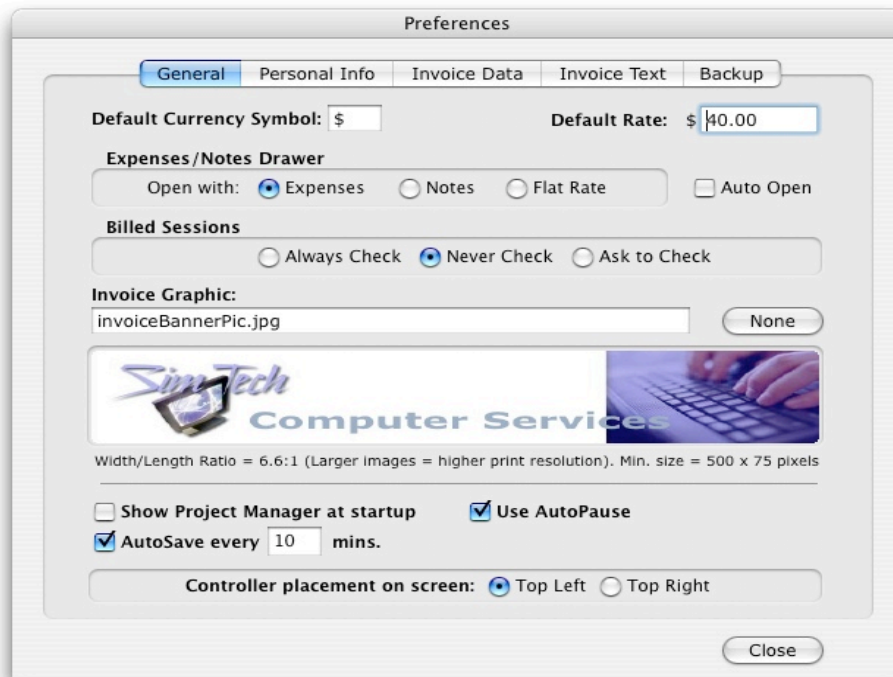
Double-click an item in the list to open or launch it.



To edit the name of an item in the list command-click on the name.

Preferences

To access the Preferences, choose Preferences... under the TaskTime3 menu.



The General Tab - The Default Currency Symbol can be set here as can the Default Rate.

The Expenses and Notes buttons determine which tab is displayed when the Expenses/Notes drawer is opened.

The Billed Sessions buttons control whether sessions are checked after an invoice for the sessions has been sent.

To use your own custom image at the top of your invoices click the Select button and navigate to the desired image. Images for invoices should be 525 pixels by 75 pixels. Most common image types (JPEG, TIFF, GIF, etc.), except EPS, can be used.

Preferences (continued)

Checking the “Show Manager Window at startup” checkbox causes the Manager Window to open automatically when TaskTime3 is launched.

The “Use AutoPause” checkbox turns the AutoPause feature on or off. When AutoPause is on and a session is started or resumed on one project, any running sessions on any other open projects will be automatically paused. This prevents you from inadvertently having two or more different project with sessions running at the same time. If you need to have two or more projects with sessions running simultaneously simply uncheck this checkbox.

The Personal Info Tab - The information that you enter here will be in your invoices. Any blank fields are just ignored.

The Message field can be used for any text you wish to display at the bottom of your invoice. Text in this field is printed in blue on your invoices.

The Invoice Data Tab:

Invoice Numbering - Check or uncheck the checkbox to turn AutoNumbering on or off. You can set or reset the automatic invoice numbering starting number by entering the desired starting number in the “Number from:” field and then clicking the Set button. Only numbers can be entered into this field.

Show Session Details - If this checkbox is checked invoices will include all session columns. If unchecked invoices will only include data from the Date, Time, and Description columns.

Round Session Times - Check to have sessions rounded up to the selected interval. Rounding is only done in the invoice for the project. The session times are not altered in the project’s session log window.

Show Session Notes - When this checkbox is checked notes entered for sessions will be displayed in invoices.

Expense Items - Check to have any expense items included in the invoice.

Flat Rate Items - Check to have any flat rate items included in the invoice.

The Invoice Text Tab - The words and phrases shown here are used in invoices. Any of these words or phrases can be edited here. This is an easy way to localize your invoices to a language other than English.

The Backup Tab

Backup:

To backup the data for your TaskTime3 projects you need to select a backup location (a folder into which the backup data will be placed). Once created the contents of this folder should not be tampered with.

After selecting a backup location, clicking the Now button will immediately backup all project and related data. A folder called "TaskTime Projects" will be placed in the selected backup folder.

Scheduled backups can also be performed. To have TaskTime3 perform scheduled backups, check the checkbox and enter the desired number of days between backups. Each time TaskTime3 is launched it will check to see if the entered number of days has passed since the last backup. If so, a backup will automatically be performed.

Whenever a backup is performed the **Last Backup** date will be updated.

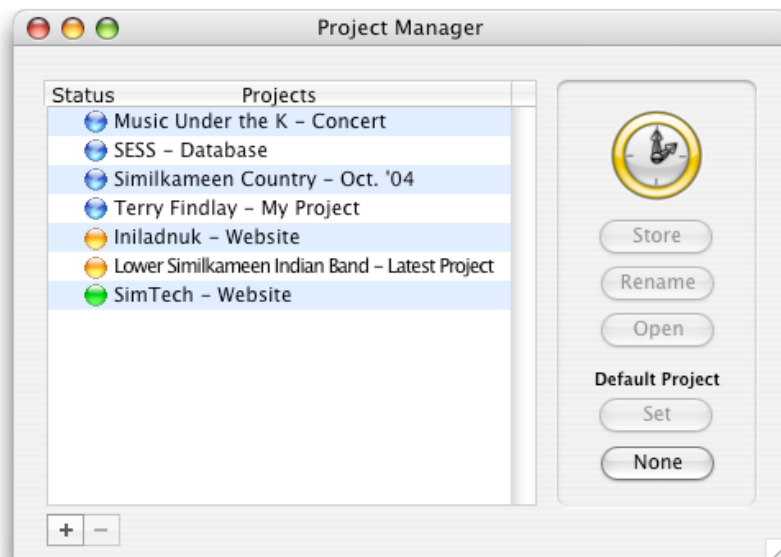
Restore:

Should the need arise to restore data from your latest backup there are 2 choices:

- [1] Restore all projects - completely replaces existing data with the latest backup data
- [2] Restore individual project - allows you to choose a single file to restore.

Select the desired option and click the Restore button to restore the data.

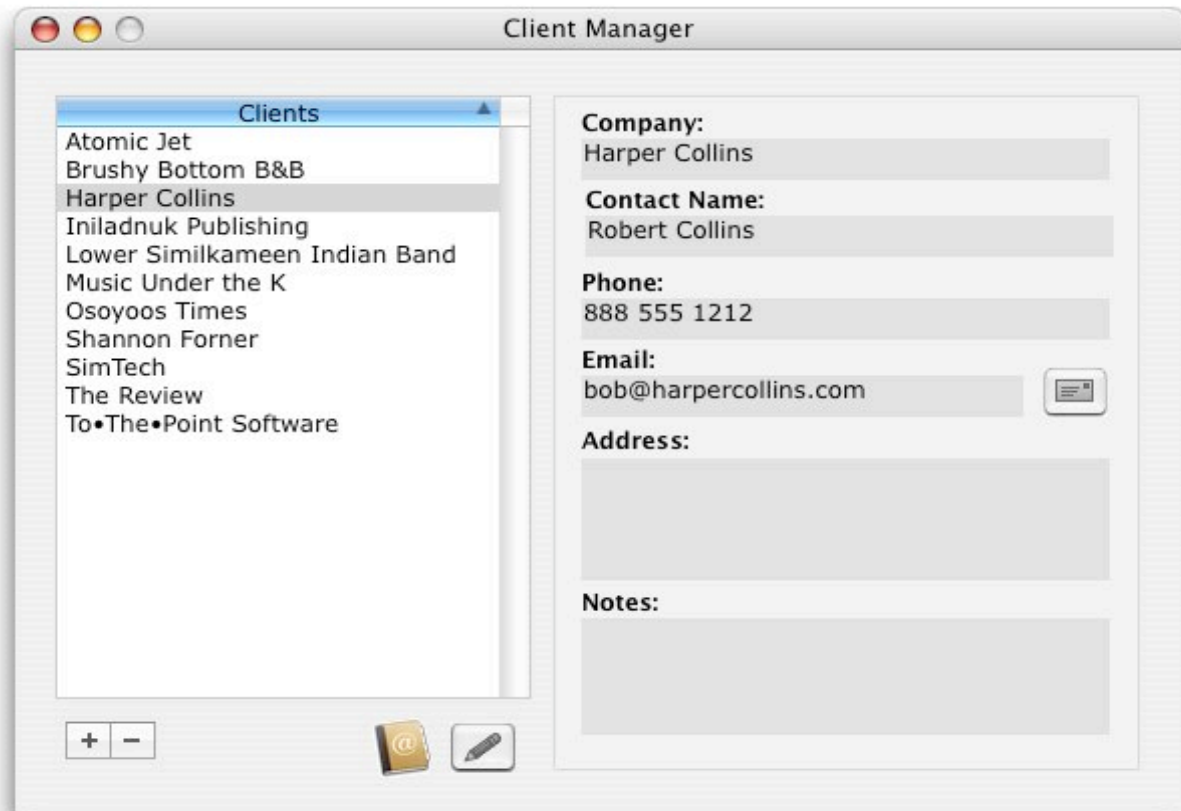
The Project Manager



Access the Project Manager from the TaskTime3 menu.

The Project Manager can be used to add, delete, rename, open, and store projects.

The Client Manager



To add a client click the “+” button under the Clients list.

In the sheet that drops down fill in a client’s name. If desired, you can also fill in the rest of the client information but only the name field must be filled in.

Click the Add button.

Clients can also be added from your Address Book. To do so click the Address Book icon. After a short delay (depending on the number of people in your Address Book) the Address Book sheet will drop down with a list of all of your contacts. To add a contact to TaskTime3 as a client select the name in the list and click the “Add” button.

To edit a client’s data select the client in the list and click the Edit (pencil) button.

To remove a client select the client in the list and click the “-” button.

If an email address has been entered for the selected client, clicking the Email (envelope) button will create an email message addressed to the client’s email address.

NOTE: In versions prior to 3.3 there was no Company field. For clients added with earlier versions you may have entered the company name in the Name field (now the Contact Name field) and may now wish to move it to the Company Name field. To do this select the client in the list and click the Edit (pencil) button.

Project Invoice Options

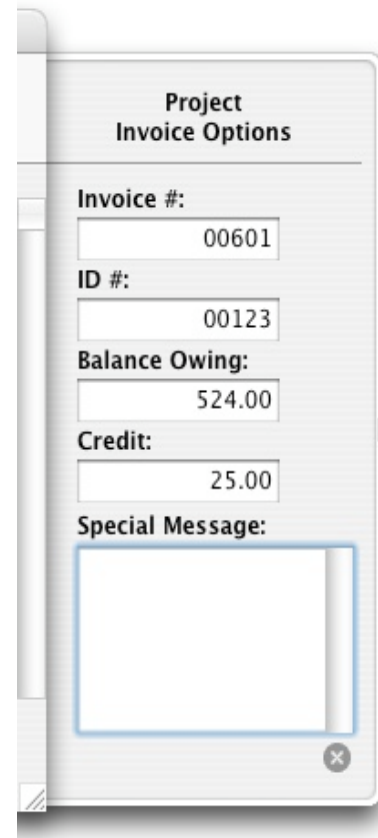
To access the Invoice Options drawer click the Invoice icon on the tool bar.

The Project Invoice Options drawer allows you to:

- edit the project's invoice number (leave the field empty if you do not wish to have an invoice number on the invoice)
- enter an ID number (purchase order, supplier number, etc.) (leave the field empty if you do not wish to have an ID number on the invoice)
- enter a balance owing if appropriate
- enter a project specific special message
- enter a credit if appropriate

About Special Messages:

In the Invoice tab of the Preferences window you can enter a message to be displayed on all invoices. Entering a Special Message in a project's Invoice Options drawer is a means of displaying a message on an invoice that is specific to the individual project.



The screenshot shows a 'Project Invoice Options' drawer with the following fields and values:

Project Invoice Options	
Invoice #:	00601
ID #:	00123
Balance Owing:	524.00
Credit:	25.00
Special Message:	

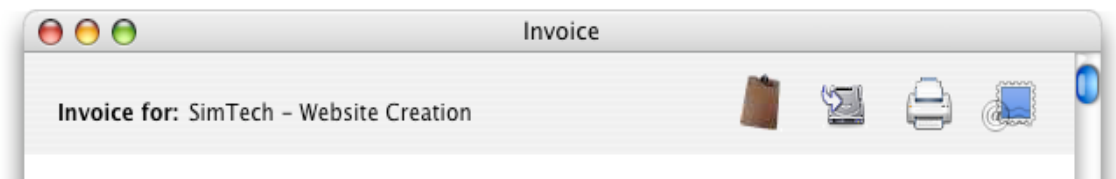
Reports

Reports show a summary of project data for all clients or for a specific client.

To generate a report choose Make Report... from the Options menu. A dialog will appear allowing you to choose a specific client for the report or to make the report for all clients.

You can also choose a date range for the report if desired.

Creating Invoices



*NOTE: General invoice information can be entered on the Invoice tab of the Preferences window. Invoice **AutoNumbering** can also be turned on or off in the Preferences Window.*

To create an invoice choose “Make Invoice...” from the File menu.

Once an invoice is generated you have several options:

The Clipboard Button- use this button to copy the invoice to the clipboard if you want to paste it into a document such as an email message.

The Save Button - saves the invoice disk as a PDF file

The Print Button - prints the invoice

The Email Button - creates a Mail email message with the invoice as an attachment.

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To send feedback, ask questions, make feature requests, or report bugs, please send email to:

contact@ttpsoftware.com

Credits

TaskTime3 was made with REALbasic. Download a free demo of REALbasic from www.realsoftware.com. Many thanks to the REALbasic programming community for their generous sharing of knowledge and resources.

Special thanks to Marcus Daniel and many other users for their very helpful feedback, suggestions, and encouragement.

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