



# TaskTime

Project timing and billing made easy

## User's Guide

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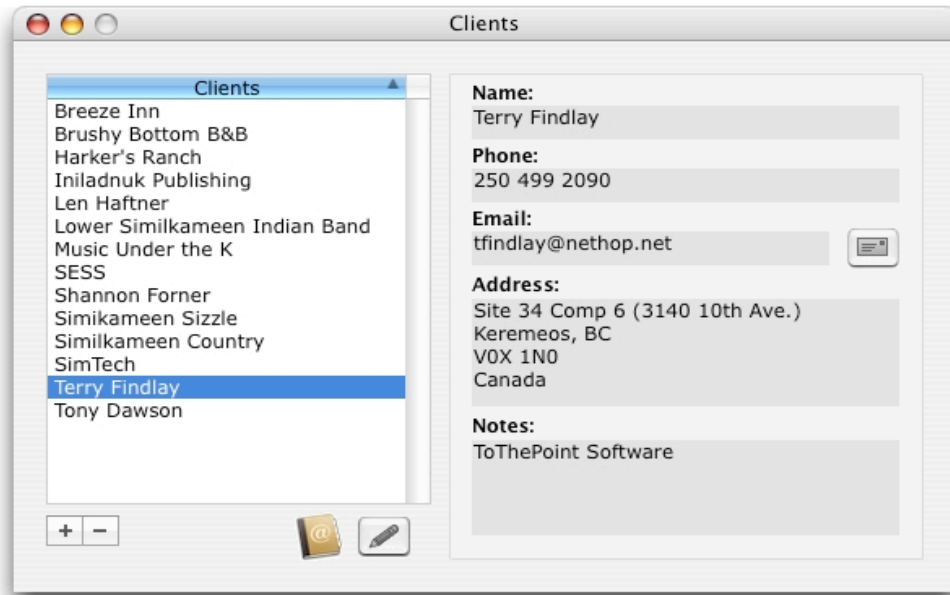
# Introduction



*TaskTime makes keeping track of time spent on multiple client projects easy and efficient. With TaskTime 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

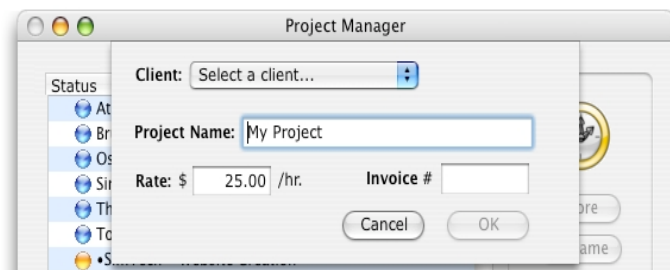


The first thing you will need to do in order to use TaskTime is add at least one client.

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.

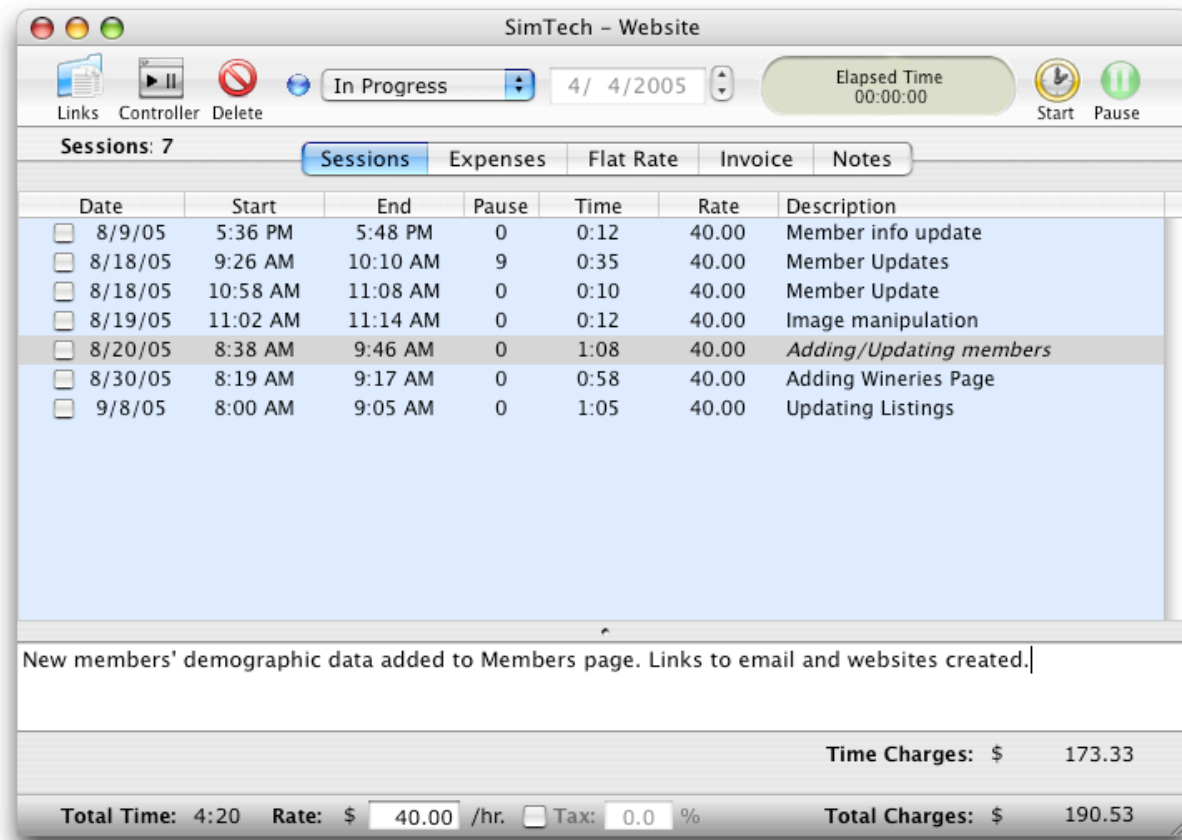


Select a client in the popup menu. Enter a name for the project. Enter a rate for the project. If desired, enter an invoice number.

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.

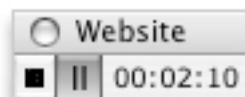
## Editing Sessions:

Click in any column to edit session data. If necessary, TaskTime will recalculate the Start, End, and/or Time columns to accommodate changes. Time Charges and Total Charges will also be adjusted as necessary.

## 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 project window just close the controller window.

To switch

# The Project Sessions Window (continued)

## Session Notes

By dragging the divider bar (just above the Time Charges) you can reveal the session notes field. When a session is selected in the sessions list this field becomes active and any session specific notes can be entered. There is a preference option to include these notes in invoices.

*The Status Popup* - shows the Status of a project:

- Begun
- In Progress (blue indicator)
- On Hold (silver indicator)
- Invoice Sent (orange indicator)
- Overdue (red indicator)
- Paid (green indicator)
- Completed (gold indicator)

NOTE: for each of the above status types a separate date is saved (except for In Progress) to indicate when each project stage began.

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

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. There are options to automate this in the Preferences.

## Tracking Expenses

Access the Expenses by clicking the Expenses tab..

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 Flat Rate Items by clicking the Flat Rate tab.

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

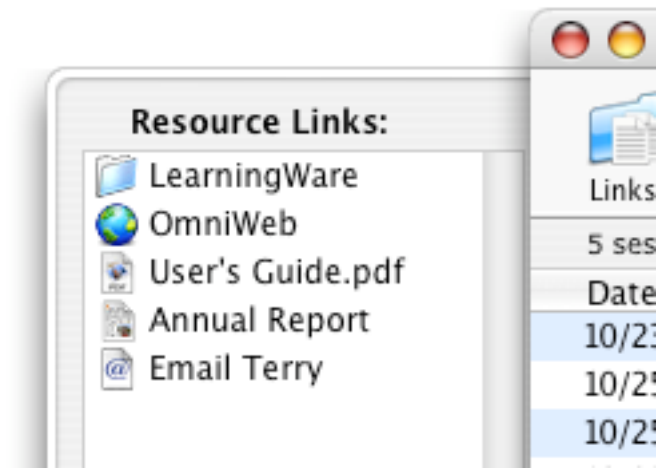
To edit an expense click in the Date, Description, or Amount column of the item to be edited.

## 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.

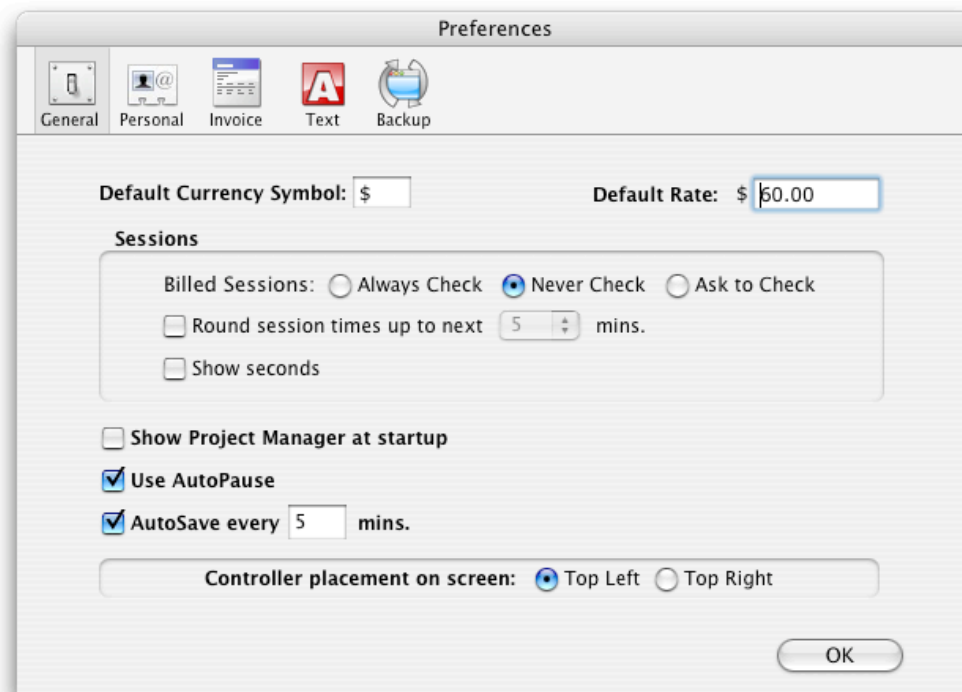
Double-click an item in the list to open or launch it.



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

## Preferences

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



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

Default Rate will be used for all sessions unless edited individually in the project window.

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

Session Rounding - session times can be rounded to the nearest number of minutes as selected in the popup menu.

# Preferences (continued)

## *The General Tab (continued)*

AutoPause - if more than one project is open and a session is started on one of them any other running projects are paused.

AutoSave - saves projects at the selected interval

Controller Placement - controls where controller windows are placed on the screen

*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 Tab* - The “Include in invoices” section allows you to select what types of data you want displayed in invoices.

AutoNumber - if checked invoices will be automatically number in sequence starting with the number entered into the “Number from” field. Click the Set button to set the entered number as the number from which all future invoices will be numbered.

Invoice Graphic: Click the Select button to choose a graphic file to be used at the top of invoices.

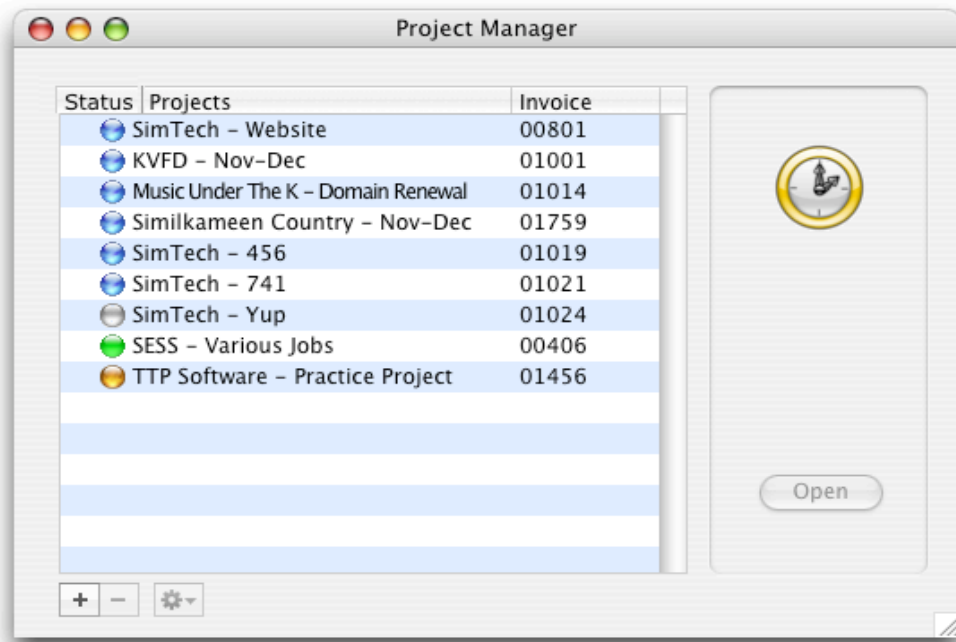
*The Text Tab* - The words and phrases on this tab are used in invoices. Edit any or all of them as desired. Click the Revert to Defaults button to revert all fields to their original default text.

*The Backup Tab* - Click the Select button to choose or change a backup location. Whenever a backup is performed all TaskTime data will be copied to this location.

Enter a number in the “days” field to specify how often automatic backup should be performed.

Restore: Use this option to restore lost or corrupted data.

# The Project Manager



Access the Project Manager from the TaskTime menu.

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

The Utility button allows you to:

1. Store a project file. Storing a project allows you to place a project anywhere on your computer. This is handy if you wish to keep completed projects for future reference rather than deleting them. Stored project can be imported back into TaskTime using the Import Stored Project... menu item under the TaskTime menu.

When you store a project it is removed from the Project list in the Project Manager window and from the Project menu.

Click the Set button to designate the selected project as the default project. If a default project has been set it will open automatically when TaskTime is launched.

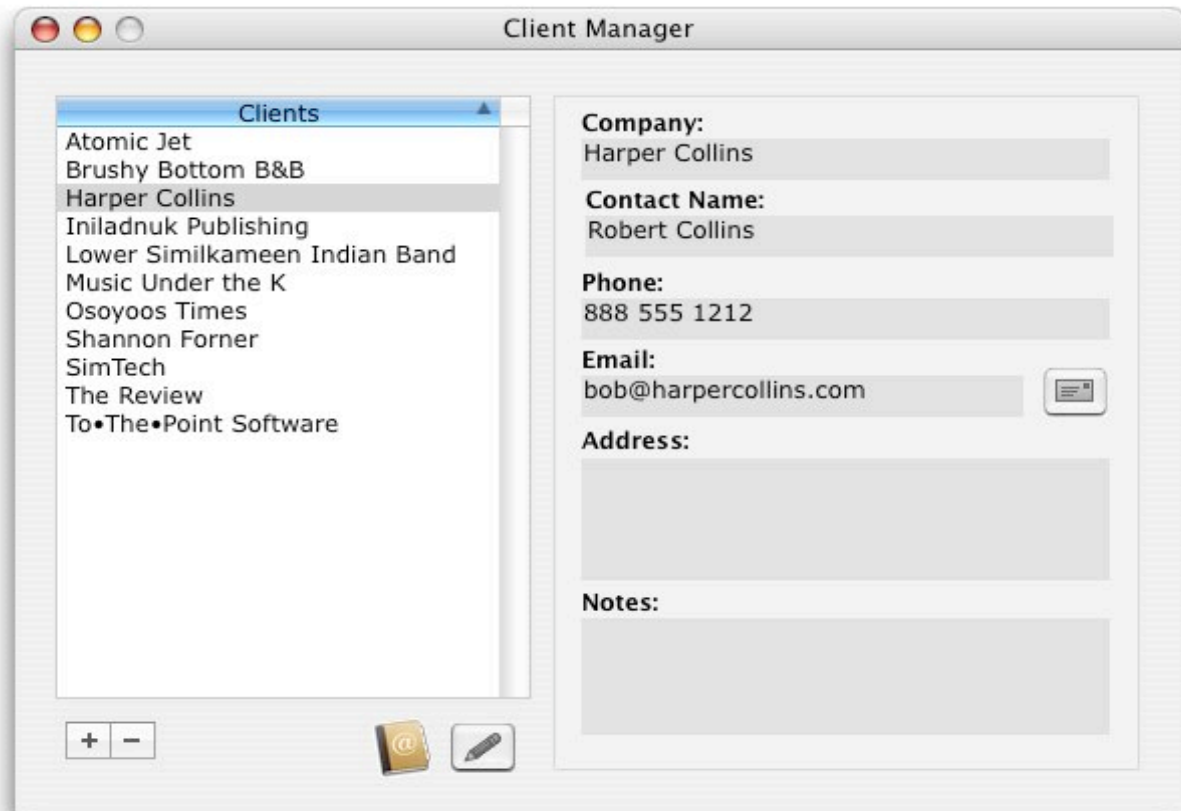
2. Rename a project.

3. Set a project as the default project (opens when TaskTime is launched) or remove a default project designation.

Projects in the list can be sorted by Status, Name, or Invoice Number by clicking on the column headings.



# 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 TaskTime 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 click the Invoice tab in a project window.

The Project Invoice Options allow 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 credit if appropriate
- enter a discount amount
- set a project specific currency symbol
- enter a project specific special message

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 tab is a means of displaying a message on an invoice that is specific to the individual project.

## Reports

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

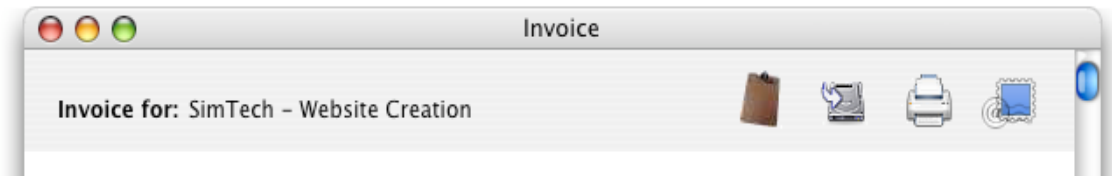
To generate a report choose Make Report... from the Options menu. A dialog will appear allowing you to choose a specific client for the report or to make the report for all clients.

The type of data to be included in the report can be selected.

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

There is also a setting for whether or not taxes should be included in report totals.

# 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.*

## QuickSessions

Sometimes you may want to quickly capture working time (eg. time spent on the phone with a client) that will need to be billed. The QuickSession feature makes this possible.

When QuickSession is selected from the Options menu (or Command + Option + Q is pressed) the QuickSessions window will appear with the session already running. The session can be paused and resumed if necessary. Once the session is stopped you can add it to any existing project or create a new project for it to be added to.

If New Project is selected in the popup menu, clicking the Add button will bring up the new project dialog.

## Menu Items

These menu items may not be self-explanatory:

**File>Project Folder Synchronization**

This options allows you to synchronize TaskTime data between two connected computers.

**File>Import Stored Project**

TaskTime allows you to store project files is a folder of your choosing. Occasionally, you may wish to reactivate a project file. This menu option allows you to do this.

**File>Print Sessions Log**

Allows you to print a log of the current project's sessions

**File>Export Data**

Select comma or tab delimiter to export project data in a format that it can then be imported into another program.

To export a project so that it can be imported into another TaskTime project select the TaskTime delimiter radio button. (See Team Projects for more on this.)

**Sessions>Add Session**

This can be handy if you want to add a session of a predetermined duration. Add the session using this menu item then click in the Time column to enter the duration of the session. Start and End times will be automatically calculated to correspond with the duration you enter.

## Miscellaneous

**Tab Bullets:**

The Sessions, Expenses, Flat Rate, and Notes tab headings will have a bullet in front of the heading if there is data saved in the tab. For example, if you have entered notes for the project the Notes tab heading will be “•Notes”. Similarly, if you have any expenses entered the Expenses heading will be “•Expenses”.

## Team Projects

TaskTime can manage projects where a team of people work together on a project to complete it.

Each team member works independently using his or her own copy of TaskTime. He or she can run sessions, enter expenses, enter flat rate items, and keep project notes as the work progresses.

When a team member completes his or her work on the project the member exports his or her work to a data file by choosing "Export Project Data" from the File menu. In the Export window that pops up the TaskTime radio button in the delimiter section should be chosen. When the Export button is clicked a standard "Save" dialog appears allowing the team member to name the export file and choose a save location.

Team members send their exported data files to the team leader.

The team leader opens or creates a project into which the team members' data files will be imported. The leader then chooses "Import Project Data" from the File menu to import the data files.

Once all of the team member data files have been imported, the team leader can then create an invoice for the collected data and send it off to the appropriate client.

# Contact, Credits, and Legal Disclaimer

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

[contact@ttpsoftware.com](mailto:contact@ttpsoftware.com)

## **Credits**

TaskTime was made with REALbasic. Download a free demo of REALbasic from [www.realsoftware.com](http://www.realsoftware.com). Many thanks to the REALbasic programming community for their generous sharing of knowledge and resources.

Special thanks to the many TaskTime users who have taken the time to send their very helpful feedback, suggestions, and encouragement.

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