
# Users Guide

**Time4Pay** offers a simple yet powerful way to keep track of the time you spend on projects. A timer keeps track of the amount of time you spend during a work session. These recorded session times can then be used to generate an invoice which can be emailed to your client.

Other features such as the ability to include flat rate items, project status history, project notes, and flexible project reporting make **Time4Pay** an ideal solution for anyone who needs to easily track time spent working on projects and to send invoices to their clients.

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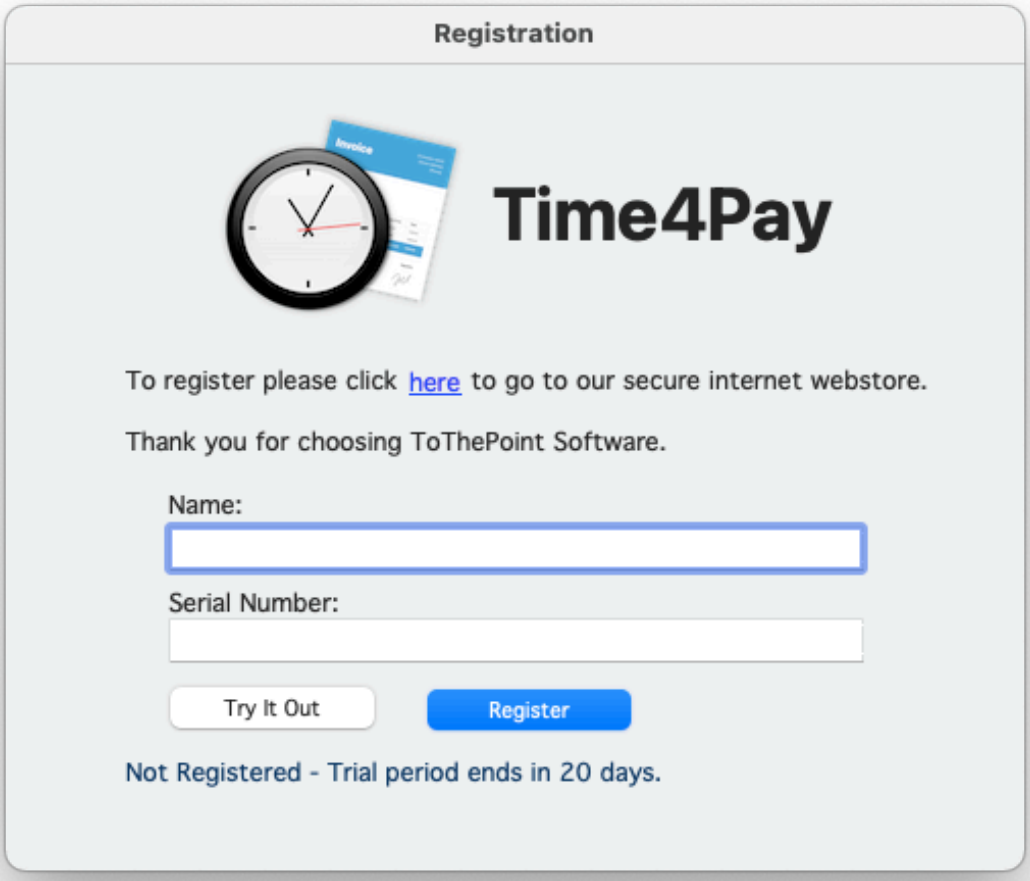
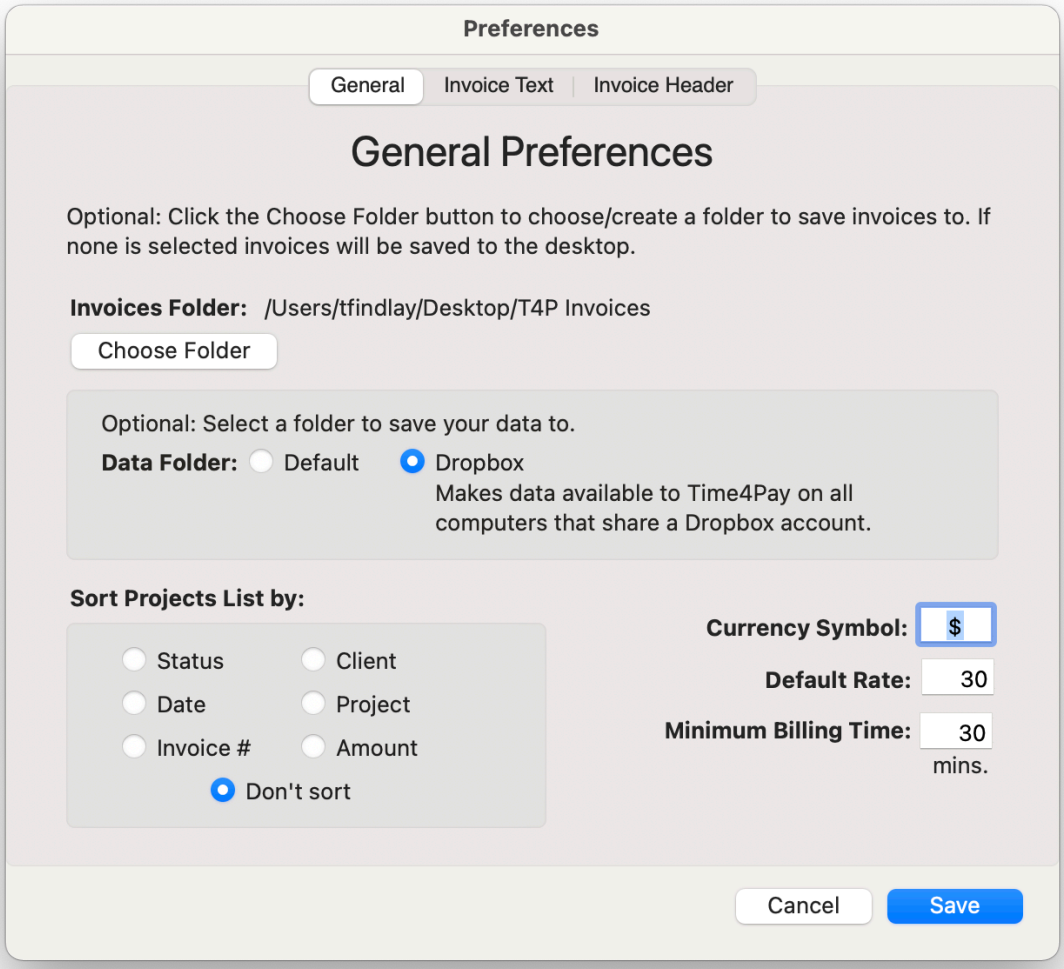
# Getting Started




Upon launching Time4Pay the Registration window will come up. To use Time4Pay in trial mode (for up to 20 days) click the Try It Out button. To register the program click the blue “here” link. Upon completion of the registration process you will receive a serial number to enter in the Registration window’s Serial Number field. Next enter your name and click the Register button to permanently unlock Time4Pay.

## Setup

Although the Preferences can be set or changed at any time it is a good idea to do this right away. To do so choose “Preferences…” from the Time4Pay menu.




**Invoice  Folder:** To choose a location for invoices to be saved to click the Choose Folder button. The chosen location will be the default location shown in Save dialogues for invoices and reports.

**Data Folder:** By default Time4Pay stores your data in your User/Library/Application Support folder. However, if you use Dropbox you can choose

to have your data saved there. Doing so allows you to sync Time4Pay data between all computers that share the same Dropbox account.

**Sort Project List:** Here you can choose which column project will be sorted by when the Manager window opens.

**Currency Symbol:** Enter your local currency symbol here to have it used in invoices and reports.

**Default Rate:** The amount entered here will be the default rate for new projects. It can be modified in the project window for a particular project.

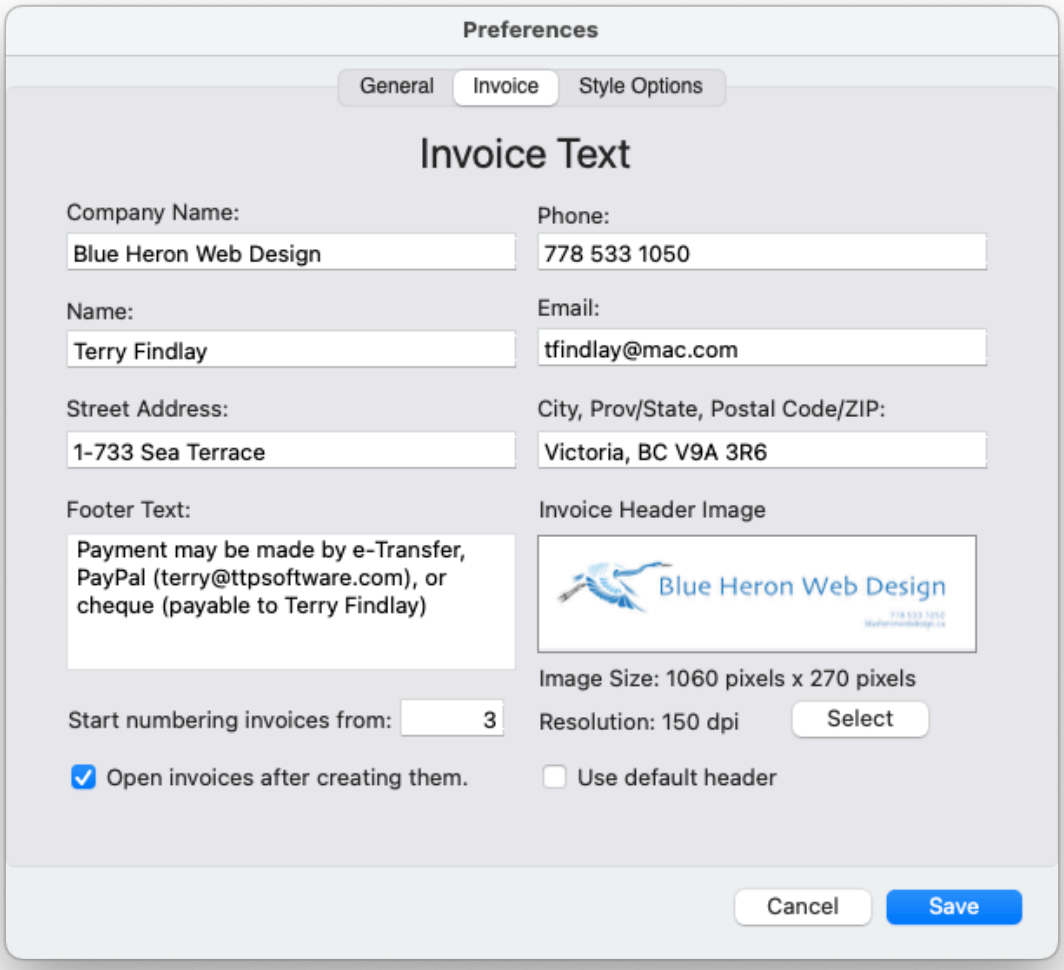
**Minimum Billing Time:** If you enter a number of minutes here any sessions that end with fewer minutes will be rounded up to this number of minutes.

**Invoice Tab:**
The text fields can hold information that you want to appear at the top of invoices.

NOTE: If a Company Name is entered it will be used for invoices and reports, and on the Manager window.

**Footer Text:** Text entered here will appear at the bottom of invoices.

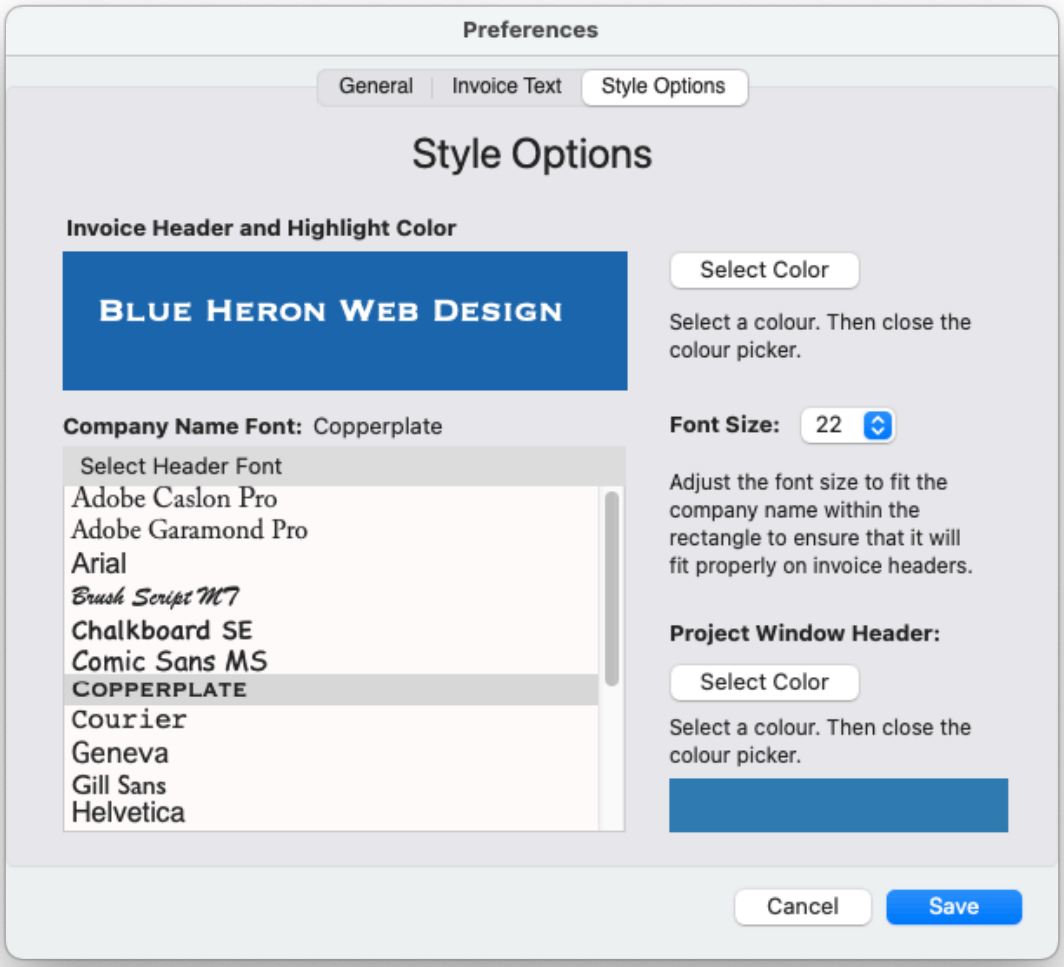
**Open invoices after creating them:** If this box is checked **Time4Pay** will automatically open invoices when they are saved making it easy to send them via email to your clients (see the **Invoices** section)



**Invoice Header Image:** You can use a custom header image instead of the default header. To do so you will need an image 1060 pixels wide and 270 pixels high with a resolution of 150 dpi. The image should be in JPEG format.

To use your custom header image click the Select button under the image area and choose your image. Be sure to click Save after selecting your image.

If at some point you decide you would rather use the default header instead of a selected custom image check the “Use default header” checkbox.



**Style Options Tab:**

**Invoice Highlight Colour:** Click Select Colour to choose a highlight colour for invoices.

**Invoice Header Font and Size**: To choose a font for your company name in invoice headers click the Select Font button.

To make sure your company name fits properly on invoice headers, adjust the size of the text so that it fits in the coloured rectangle using the Size popup menu.

**About Fonts:** Depending on the fonts installed on your computer some fonts may not display properly in invoice headers. If a font that should have a distinctive face appears as a generic font in the Header Font list this is probably the case for that font.

**Project Window Header:** Use the Select Color button to select a color for the header region of project windows.

## Adding Clients

The next thing that you will need to do is add at least one client in the Client tab of the Manager window. This window opens when you start the program. You can also open it from the Window menu. It has a Projects tab and a Clients tab. To add clients go to the Clients tab.

### Importing Clients

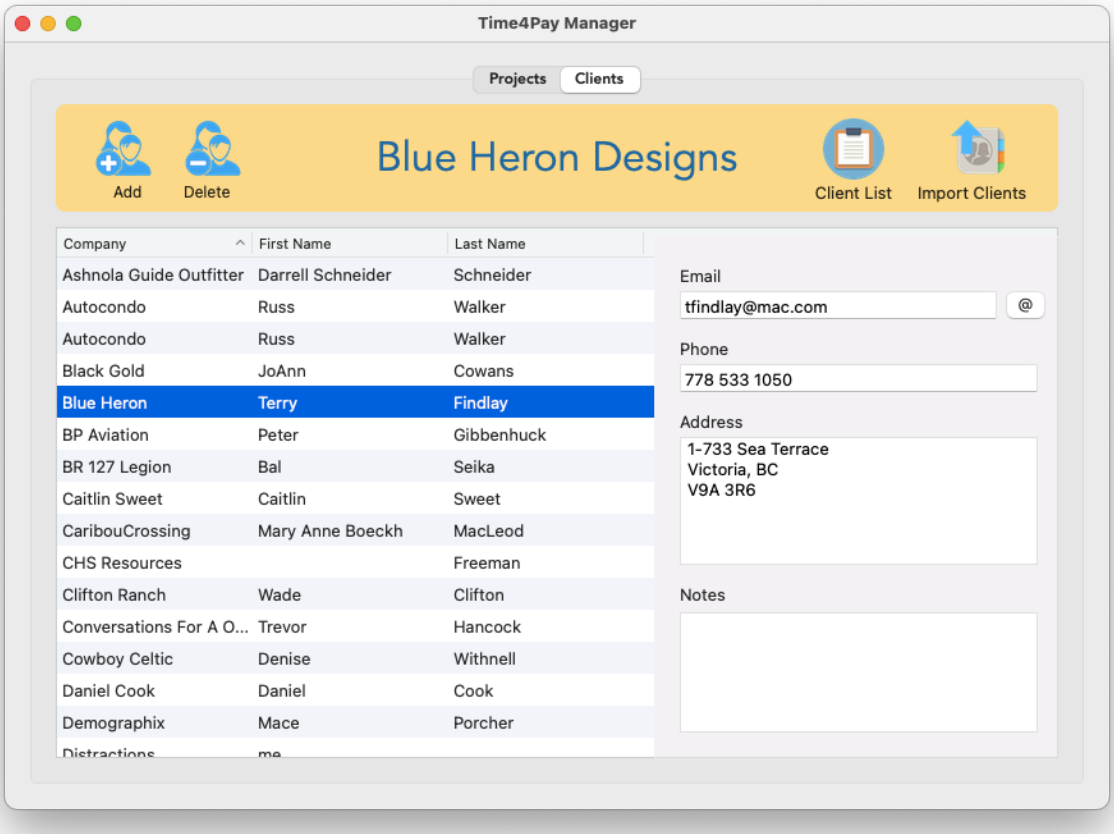
To import clients from a .csv file click the Import Clients button and follow the onscreen prompts.

### To Add Clients Manually

Click the Add icon to add a row to the client list. Enter a company name. (This column should not be left empty as it is used when a new project is created. If the client is not a company enter the client's full name.) Press the tab key to move to the First Name column. Continue to tab through the columns and enter the appropriate information. It is okay to leave column cells empty (except the Company column) but it is recommended that you

fill in at least the first three column cells (Company, First Name, and Last Name).

Client information can be edited by clicking on the cell in the list that you want to edit.

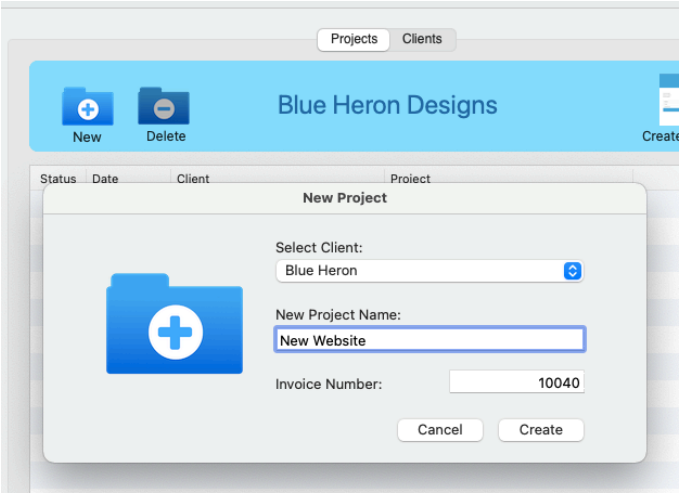



Add as many clients as you want. You can always add more at any time. Once a client has been added to this list you can create a project for that client.

## Creating a Project

To create a project for a client that you have added in the Client tab go to the Projects tab. Click the New icon.

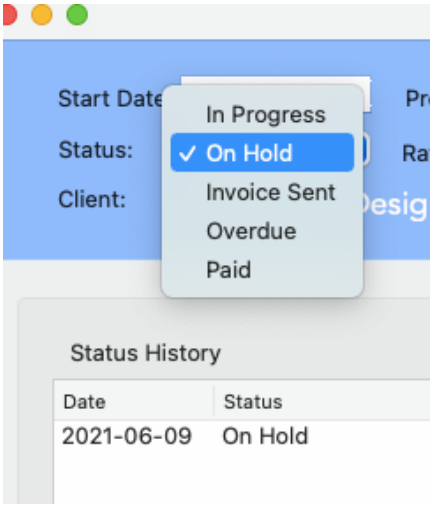
In the New Project window select a client from the dropdown menu. Enter a name for the project and click the Create button.



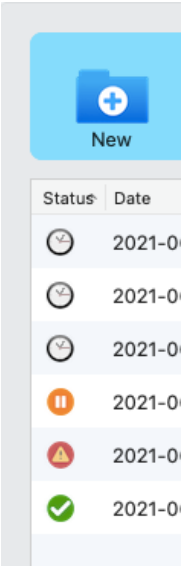

The project's window will come up. At the top left is information about the project: the Project Number (invoice number), Start Date, Status of the project, and the name of the Client. To the far right is the Session Timer. There is also a button to create an invoice for the project.

**Project Status:**

Using the Status dropdown menu you can set the status of the project to: In Progress, On Hold, Invoice Sent, Overdue, or Paid. Whenever the status of the project is changed the date of the change and the selected status are recorded in the Status History list. This list can be handy for looking back over the progress of the project over time.




A project's status is also indicated on the Project tab of the Manager window in the Status column.




In progress

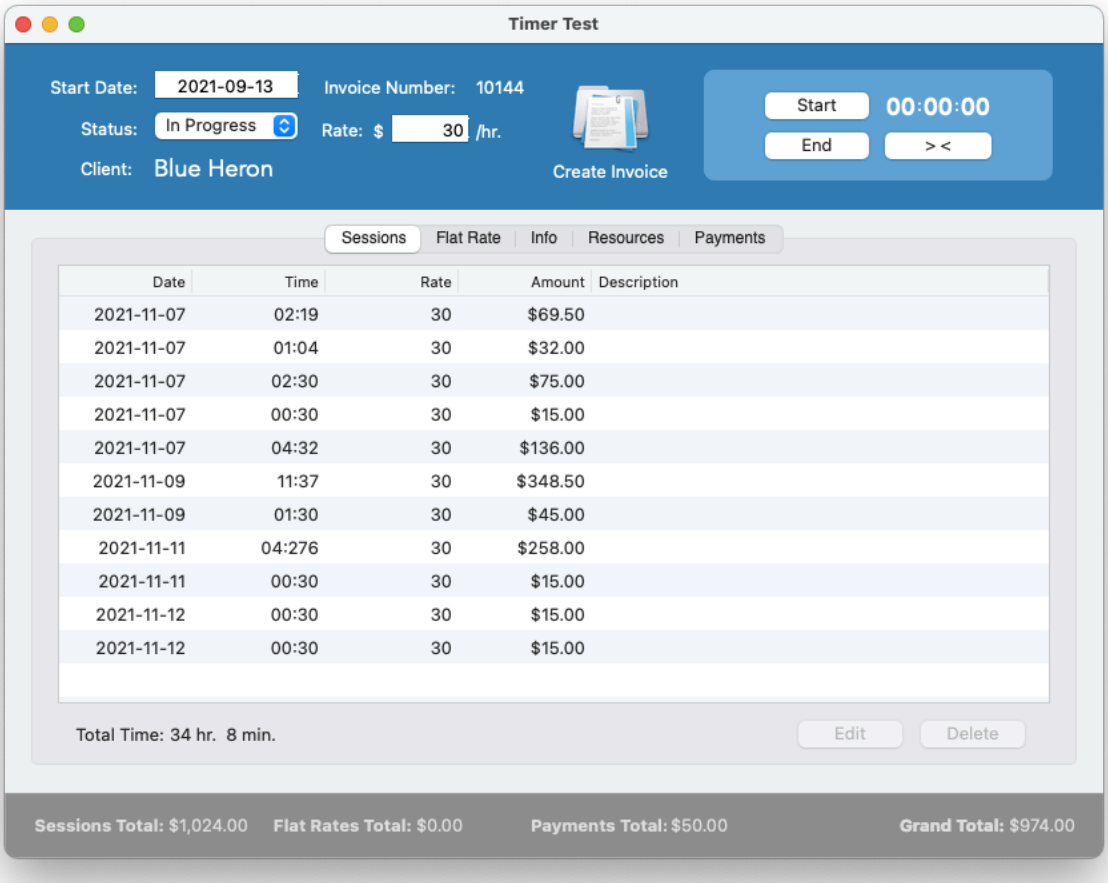
On hold

Invoice sent

Overdue

Paid

The status of a project is indicated in the Manager window using the icons above.

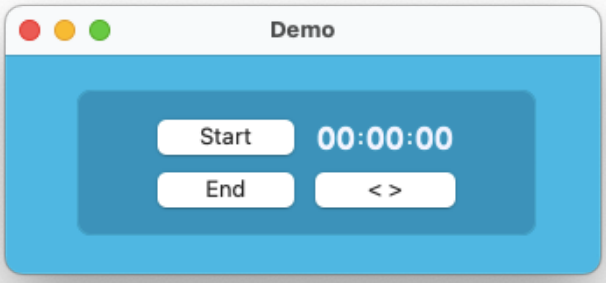



There are five tabs in the middle section of the project window: Sessions, Flat Rate, Info, Resources, and Payments.

## About Sessions

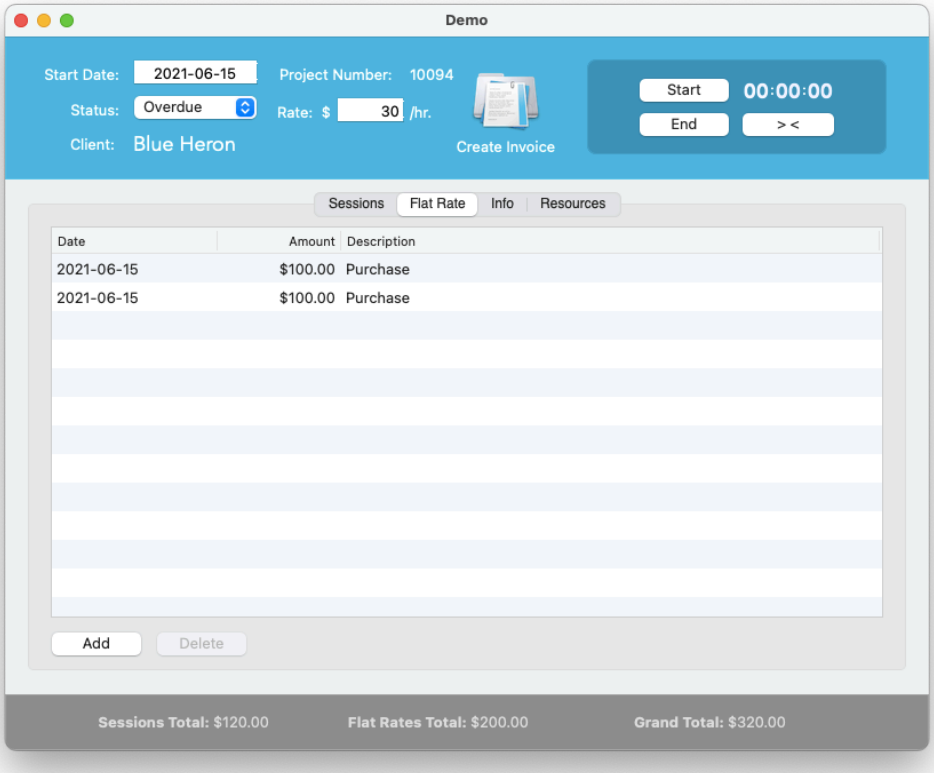
A session is a block of time that you have put in on the project. To begin a session enter a Rate in the field in the upper portion of the window. Then click the Start button in the Session Timer region. When you do this the Start button's label turns to Pause. You can pause and resume a session using this button. To finish a session click the End button. When you click the End button the Date, Time, and Rate for the session will be added to the sessions list. You can then enter a description of the work that was done during that session.

### The Session Timer:




Sessions times are recorded using the Session Timer on a project's window. Sometimes it may be inconvenient to have the project window taking up space while you are working on the project in another application. When this is the case click the > < button to collapse the window to just the timer area. To return to the full project window click the < > button.

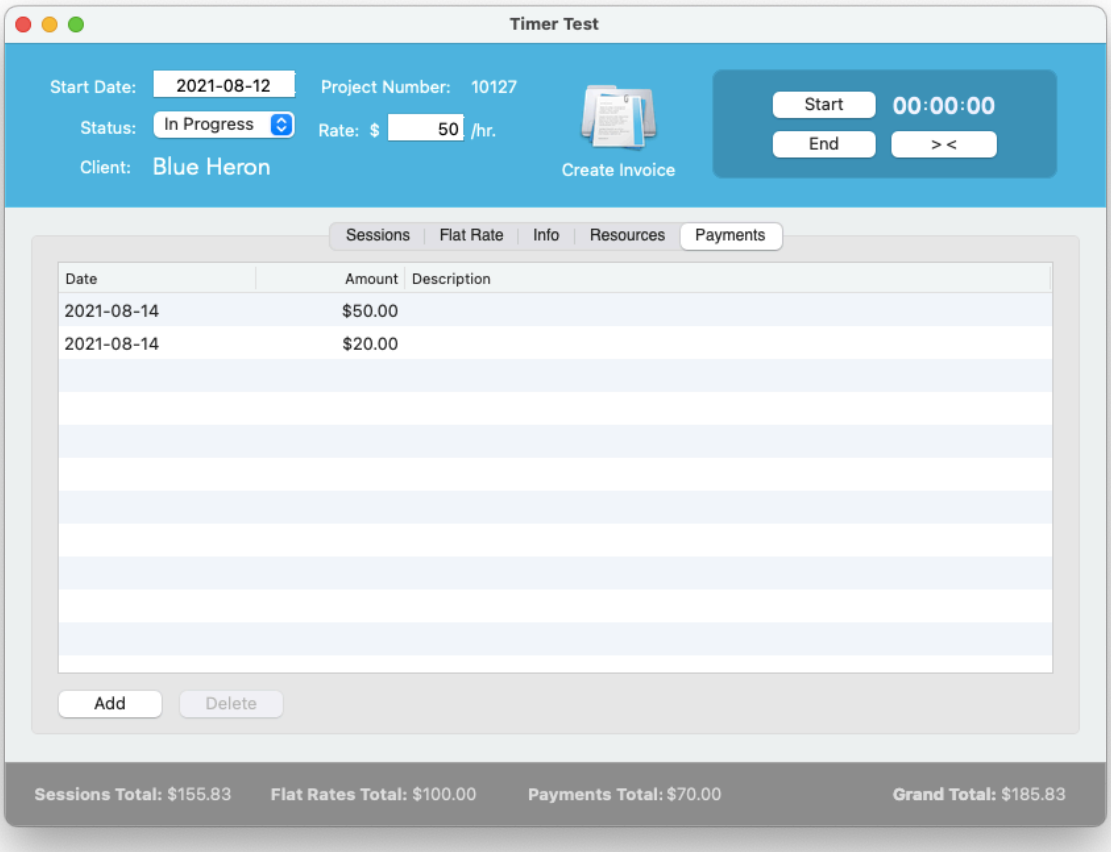
## About Flat Rates




Flat Rate items are items that you charge a flat rate for such as website hosting or creating a logo. Also any supplies you may have purchased for

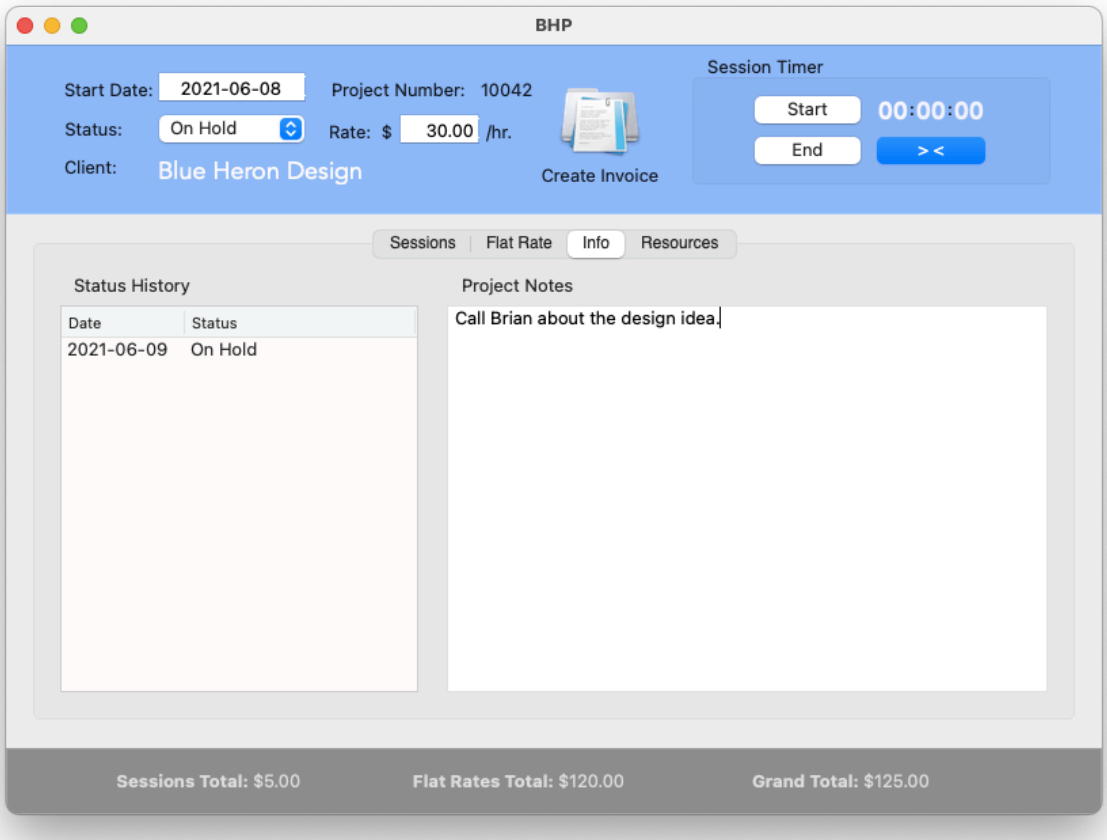
the project can be charged to the client as a flat rate item. Flat Rate items can be add to a project in the Flat Rate tab. To do so click the Add button. A row will be added to the Flat Rate items list. Enter the amount and the description for the item. Flat Rate items can be edited by selecting them in the list then clicking again in the Amount or Description cell.

## About Payments




If a client makes a payment toward the full cost of the project you can enter it in the Payments tab. Payment amounts are subtracted from the Grand Total.

## About The Info Tab




**Status History**:
Whenever the status of the project is changed using the Status popup menu a record of the change is added to the Status History list with the date of the change of status. This provides a way to look back over the development of a project as it progresses or at some point in the future.

**Project Notes:**
The project notes field is for keeping any project related notes.

## About the Resources Tab

In the Resources tab you can drag and drop files or folders onto the list area to create links to items related to the project.

## Saving Projects

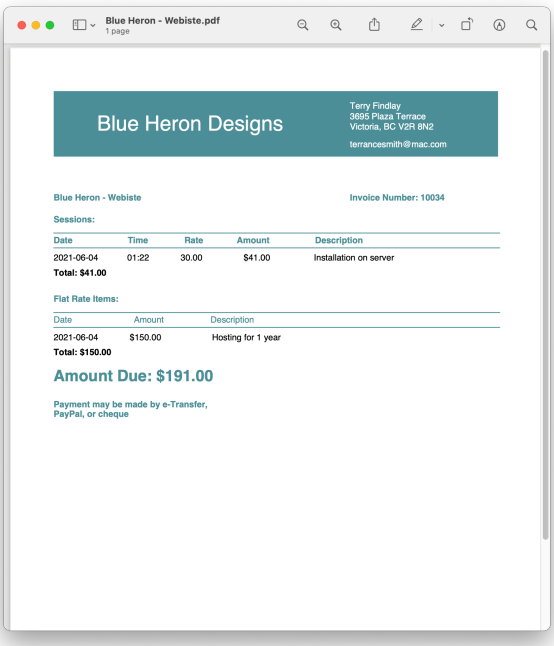
When a project window is closed it's data is automatically saved and it is added to or updated in the Projects list in the Manager window.

## Opening Saved Projects

To open an existing project from the Manager window double-click on the project in the projects list. It is possible to open more than one project at a time.

# Invoices

To create an invoice for a project click the Create Invoice icon in the top region of the project's window. **Time4Pay** creates and saves invoices in PDF format. There are a number of settings in the Preferences that can be set to affect the content of invoices. (See the **Setup** section at the beginning of this guide.)



Blue Heron - Webiste.pdf
1 page

Blue Heron Designs

Terry Findlay
3695 Plaza Terrace
Victoria, BC V2R 8N2

terrancesmith@mac.com

Blue Heron - Webiste

Invoice Number: 10034

Sessions:

| Date | Time | Rate | Amount | Description |
|---|---|---|---|---|
| 2021-06-04 | 01:22 | 30.00 | $41.00 | Installation on server |

**Total: $41.00**

Flat Rate Items:

| Date | Amount | Description |
|---|---|---|
| 2021-06-04 | $150.00 | Hosting for 1 year |

**Total: $150.00**

**Amount Due: $191.00**

Payment may be made by e-Transfer, PayPal, or cheque

Invoice with default header

Blue Heron - Horse...
1 page

Blue Heron Web Design

778 533 1050
blueheronwebdesign.ca

Blue Heron - Horse With A New Name
Invoice Number: 10144
Date: 2021-12-07

Sessions:

| Date | Time | Rate | Amount | Description |
|---|---|---|---|---|
| 2021-11-07 | 02:19 | 30 | $69.50 | |
| 2021-11-07 | 01:04 | 30 | $32.00 | |
| 2021-11-07 | 02:30 | 30 | $75.00 | |
| 2021-11-07 | 00:30 | 30 | $15.00 | |
| 2021-11-07 | 04:32 | 30 | $136.00 | |
| 2021-11-09 | 11:37 | 30 | $348.50 | |
| 2021-11-09 | 01:30 | 30 | $45.00 | |
| 2021-11-11 | 04:20 | 30 | $130.00 | |
| 2021-11-11 | 00:30 | 30 | $15.00 | |
| 2021-11-13 | 00:51 | 30 | $25.50 | |

**Total: $891.50**

Payments:

| Date | Amount | Description |
|---|---|---|
| 2021-11-12 | $50.00 | |

**Total: $50.00**

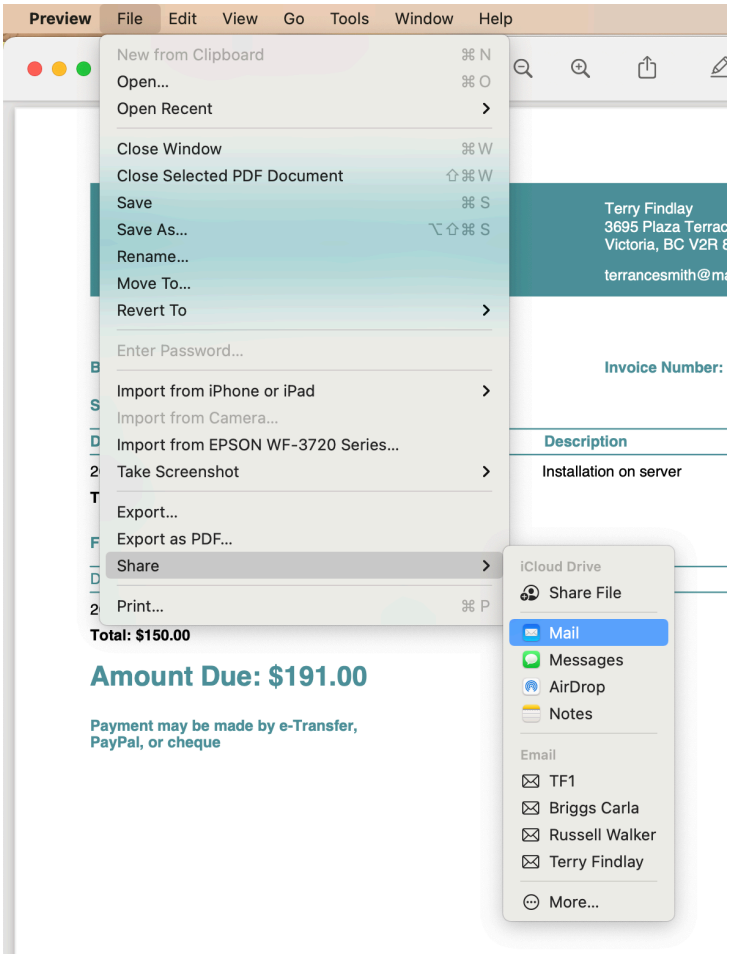
**Amount Due: $841.50**

Payment may be made by e-Transfer, PayPal (terry@ttpsoftware.com), or cheque (payable to Terry Findlay)

Invoice with custom image header

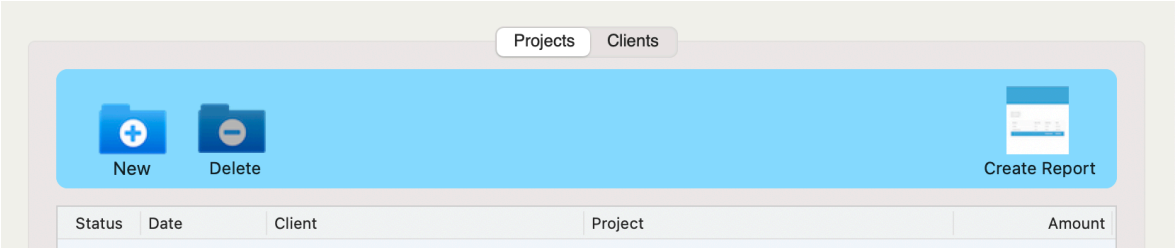
**Emailing Invoices:** To easily attach an invoice (that is open in Preview) to an email message go to the File menu in Preview and select Share. In the submenu select Mail.

When the email comes up you can copy the client's email address from the Client tab of the Time4Pay Manager window, enter a subject and send the email.



# Reports

**Time4Pay** can produce a variety of reports.




To create a project report click the Create Report button on the Projects tab of the Manager window. Reports can be organized by client, date, status, project name, invoice number, amount, or a combination of these project list columns. Project reports can be configured in two ways. You can arrange the order of the projects in the project list by clicking on any column heading. This will list the projects in ascending or descending order according to the column heading clicked. Also you can select which projects to include in the report by selecting them in the projects list.

Using these two methods you can, for example, create a report of the projects that have a paid status and that have a date within the last month. To do this you would first click the heading for the Status column. This would group the projects by status. Next you would select those projects (within the grouped paid projects) having a date within the past month. With this arrangement a report of the paid projects for the month selected would be generated when the Create Report button is clicked.

NOTE: If no projects are selected in the projects list the report will include all of the projects in the list.

# Client Lists

To create a list of your clients in PDF format click the Client List icon on the Clients tab of the Manager window.

# Archiving and Reinstalling Projects

Projects can be removed from the Manager window's Projects list by achieving them. To archive one or more projects select the project(s) in the list and then select "Archive selected projects…" under the File menu. Select a folder to archive the projects in and click Select. The selected projects will be moved from the Time4Pay data folder to the folder just selected and removed from the Manager window's Projects list.

Projects that have been archived can be reinstalled using the "Reinstall archived project…" menu item under the File menu.

## Contact ToThePoint Software

Website: ttpsoftware.com
Email: info@ttpsoftware.com