Clockify

Getting Started

Welcome to Clockify!

Learning how to use a new app can take time and energy. That's why we created this quick guide to get you up and running with Clockify in less than 15 minutes.

By the end, you'll know how to use Clockify and all its features, as well as learn some tips and tricks for tracking time and organizing projects.

Why Use

Productivity

With Clockify, you'll have an accurate look at your work week and see where you spend most of your time. This will help you find time-sinks and become more efficient.

You'll see whether you spend too much time on some activities (eg. meetings) and start thinking about what activities you can cut or delegate so you can focus on finishing more important tasks.

Profitability

You rarely get to bill for all the time you spend on a client, like Skype calls, emails, project management, invoicing, and other activities - but they all add up.

With Clockify, you can track both billable and nonbillable activities, see your real hourly rate, and raise prices if you find that non-billable work takes way too much time.

Team accountability

With Clockify, everyone in your team can track time they spend working on tasks.

Then, you can see who worked on what and whether they filled their 40 hours/week quota.

You can also see what activities take too much time and whether you should give your team to work on something more important.

Client transparency

Billing is much smoother when you can show clients where each hour went. With Clockify, you can be more transparent and accurate when the time comes to bill your clients.

Plus, you'll spend less time on invoicing once you have all the time records organized in one place.

Who uses Clockify

- freelancers and consultants to track their hourly rates
- entrepreneurs to identify time-sinks and improve productivity
- business managers to keep track of their team's work
- everyone who want to improve their efficiency

Clockify

Brief Overview

Everything in Clockify revolves around time entries. You track time you spend working on things and then analyze workweeks in reports. Clockify also lets you invite others so you can track and analyze time together.

There are two ways you can track time in Clockify:

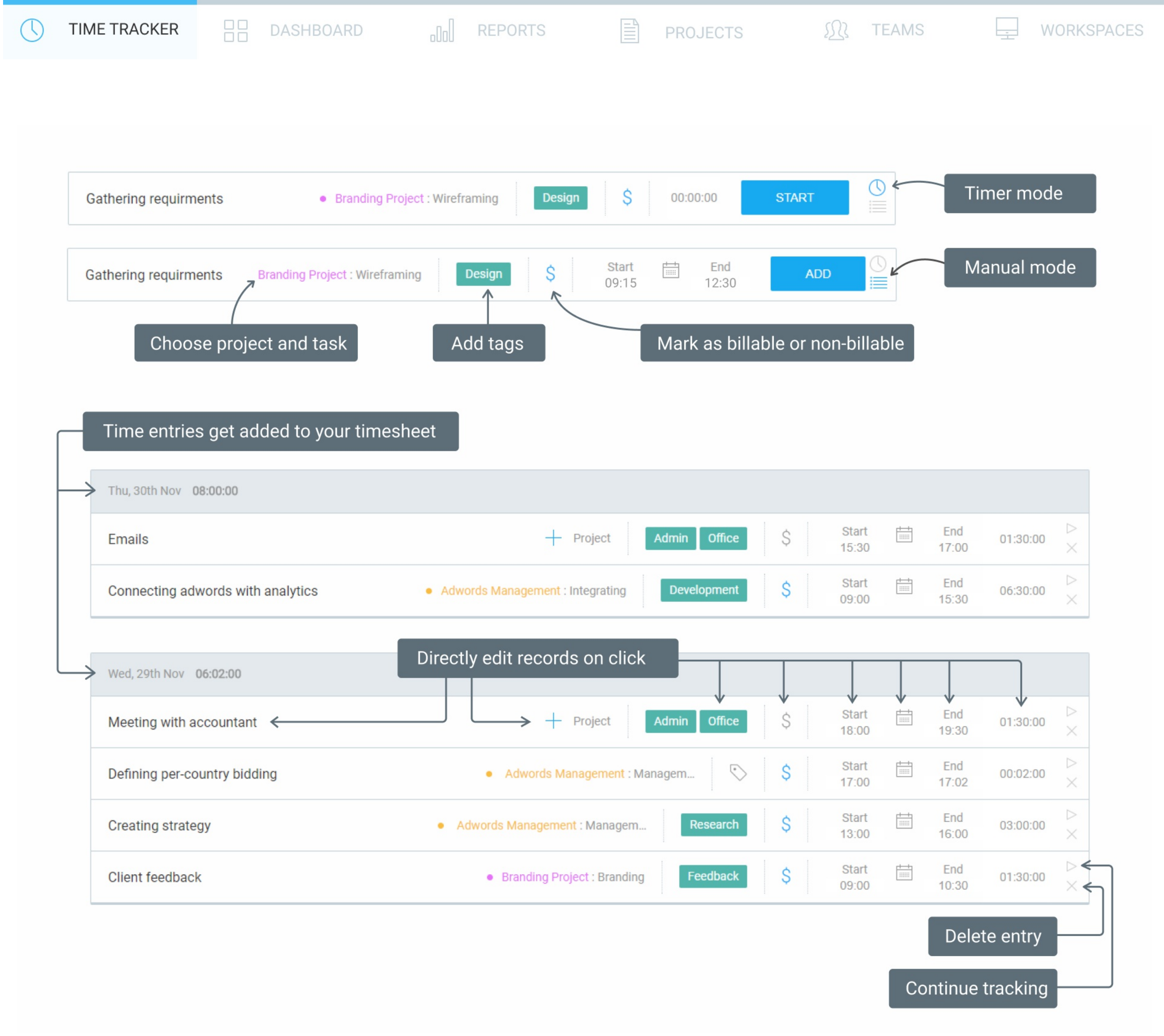
Automatically, while you work

When you start working, type what you're working on and start a timer; when you finish, stop the timer and the time entry gets added automatically to your timesheet.

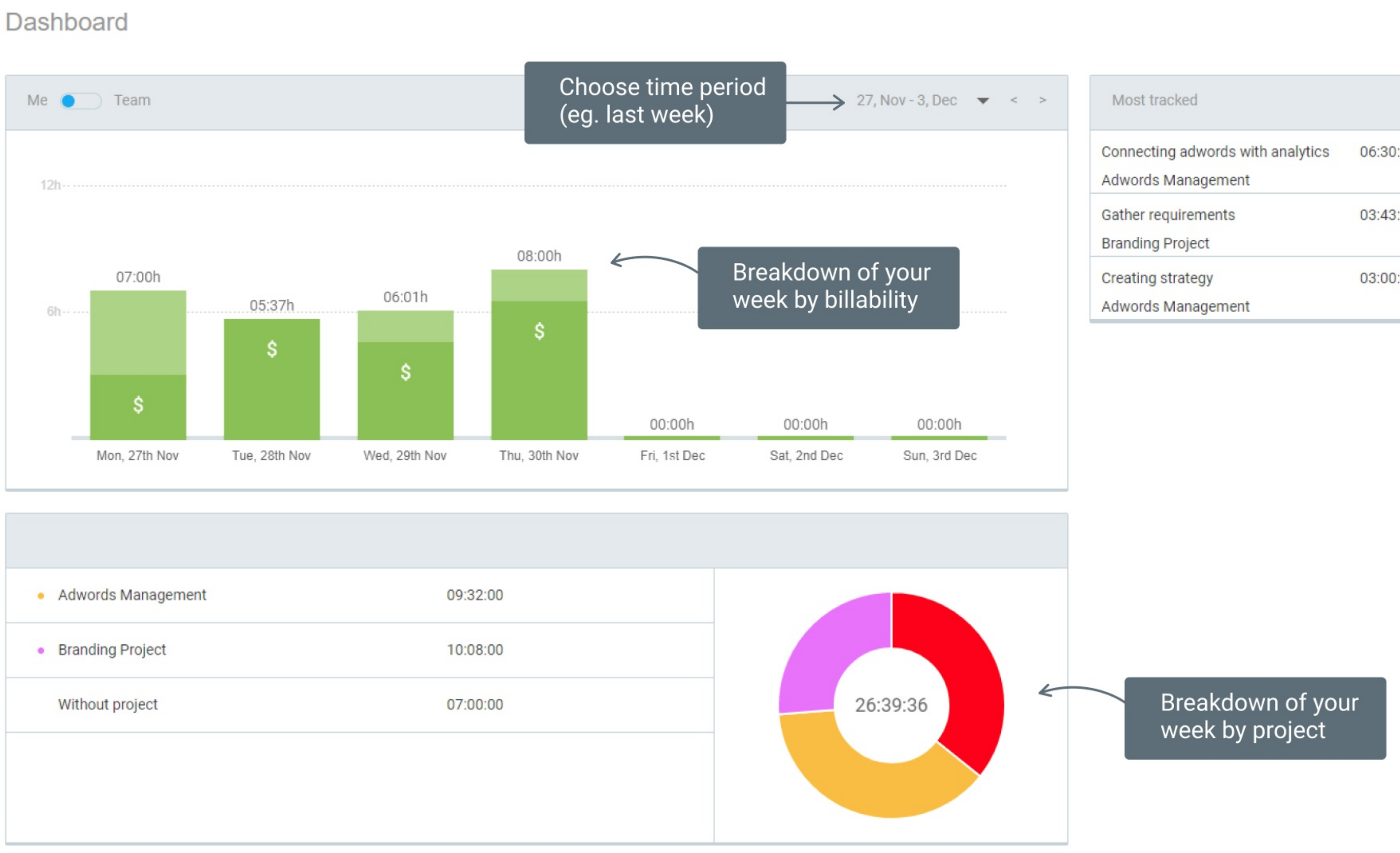
Manually, after you've finished working

If you don't want to bother with the timer (or you forgot to start it), you can manually add all the time entries at the end of your day. Simply type what you worked on, choose start and end time, and add the time entry.

Time entries are more useful once you categorize them. Add a client, project, task, billability status, and custom tags to each time entry so you can better analyze your time (before they're available for selecting in time tracker, you first have to define clients and tags in your workspace settings and create projects and tasks in Projects).

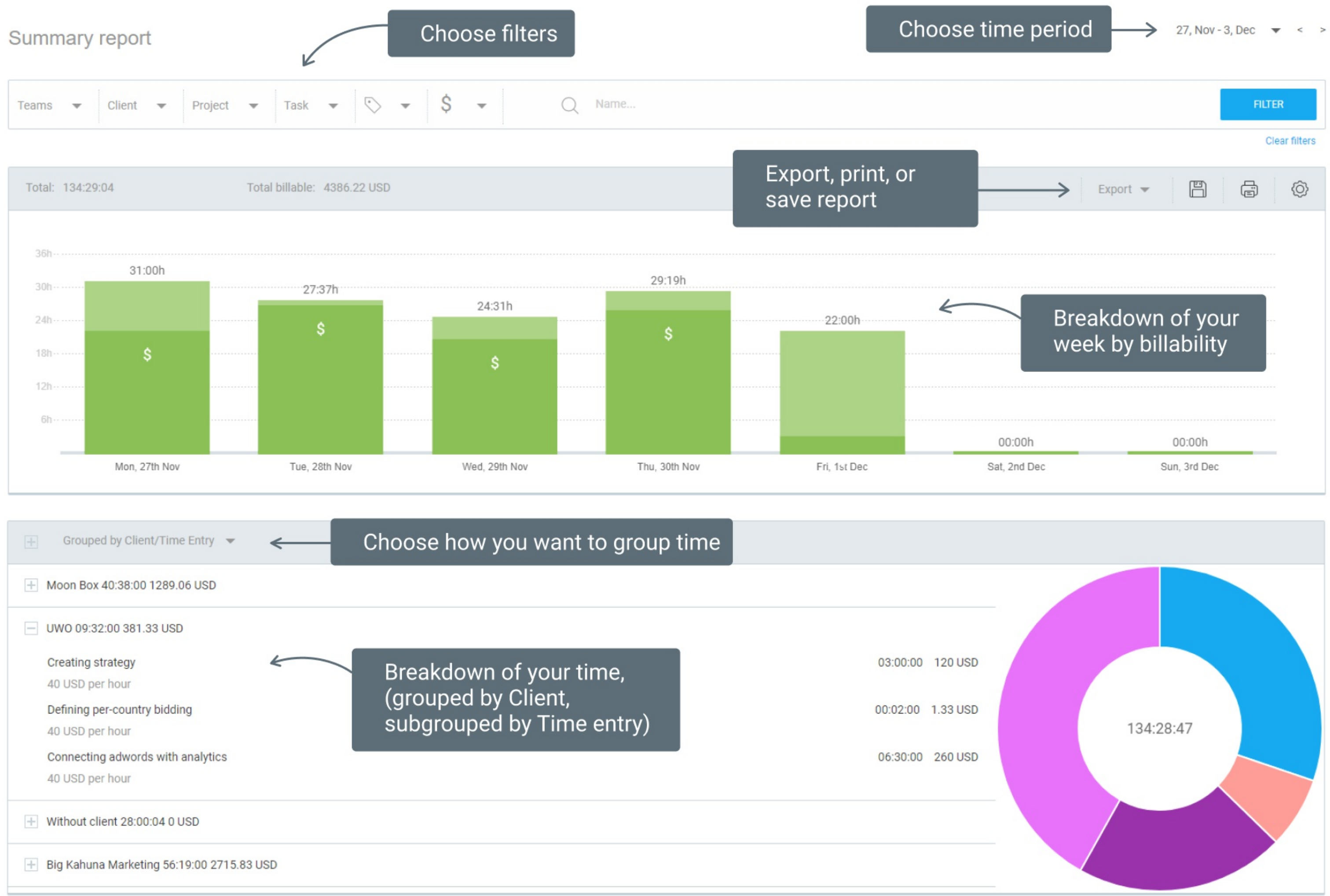

TIME TRACKER
DASHBOARD
REPORTS
PROJECTS
TEAMS
WORKSPACES
Gathering requirments
Branding Project : Wireframing
Design
$
00:00:00
START
Timer mode
Gathering requirments
Branding Project : Wireframing
Design
$
Start 09:15
End 12:30
ADD
Manual mode
Choose project and task
Add tags
Mark as billable or non-billable
Time entries get added to your timesheet
Thu, 30th Nov 08:00:00
Emails
Project
Admin
Office
Start 15:30
End 17:00
01:30:00
Connecting adwords with analytics
Adwords Management : Integrating
Development
Start 09:00
End 15:30
06:30:00
Directly edit records on click
Wed, 29th Nov 06:02:00
Meeting with accountant
Project
Admin
Office
Start 18:00
End 19:30
01:30:00
Defining per-country bidding
Adwords Management : Managem...
Start 17:00
End 17:02
00:02:00
Creating strategy
Adwords Management : Managem...
Research
Start 13:00
End 16:00
03:00:00
Client feedback
Branding Project : Branding
Feedback
Start 09:00
End 10:30
01:30:00
Delete entry
Continue tracking

Once you have added some time entries, you can visit Dashboard to see how productive you are. Dashboard shows you how much time you've tracked each day and where you spent most of your time.

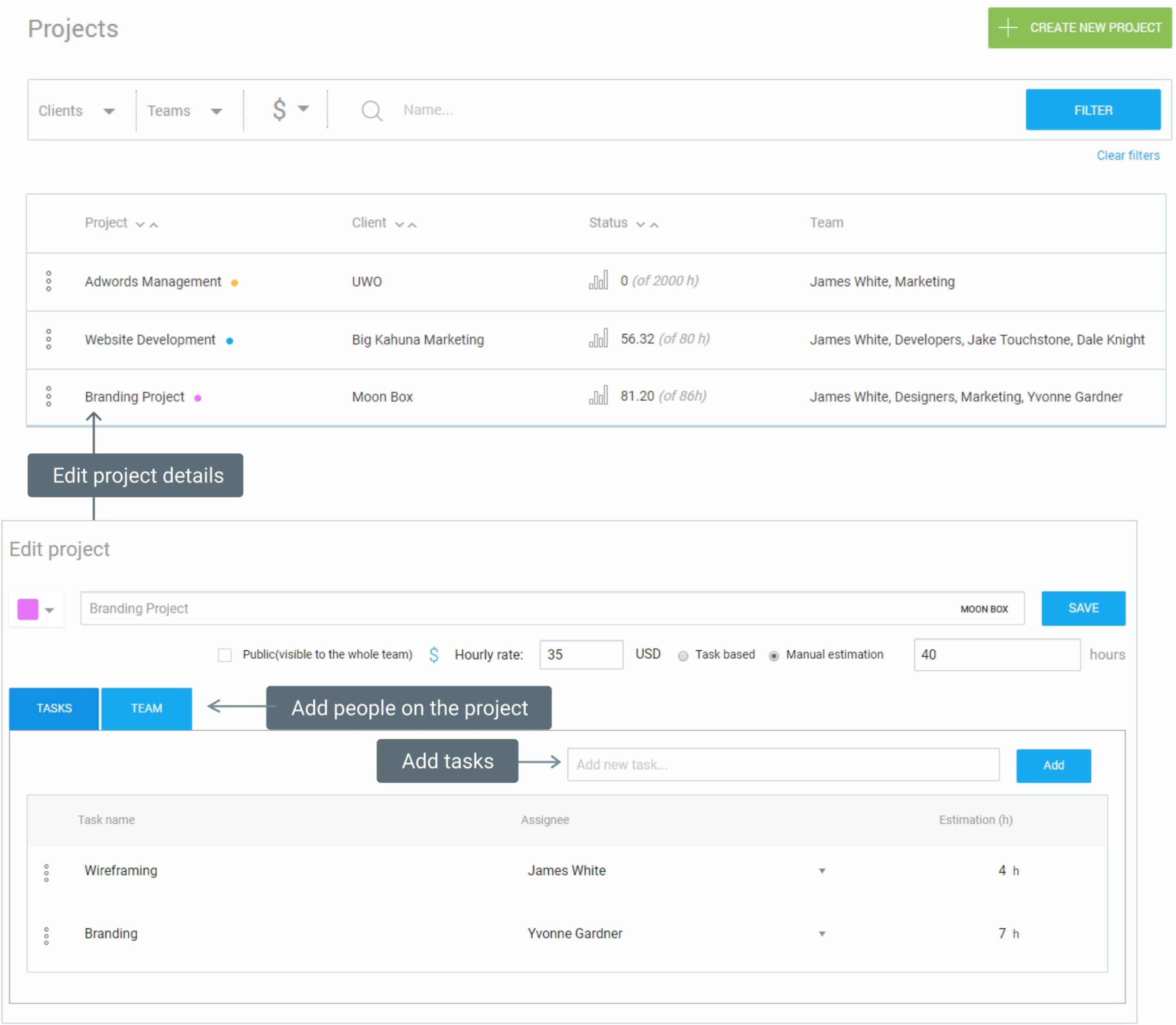


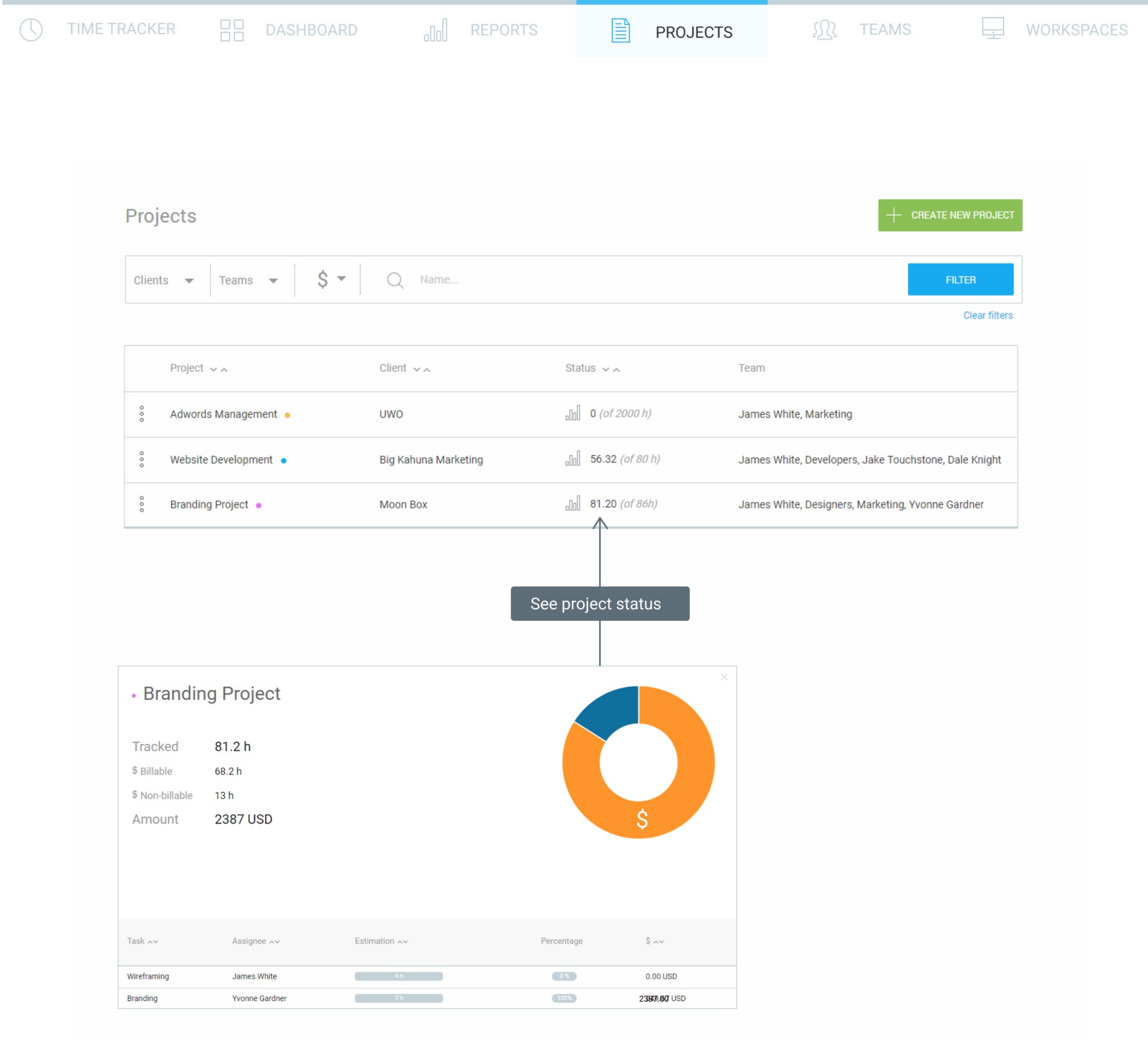
TIME TRACKER DASHBOARD REPORTS PROJECTS TEAMS WORKSPACES

There are three types of reports in Clockify when you need an in-depth analysis. Summary report is your standard report where you can filter time records and see what you need. Detailed report is for when you want to directly edit time entries you've filtered. Weekly report is for seeing who tracked how much time each week.

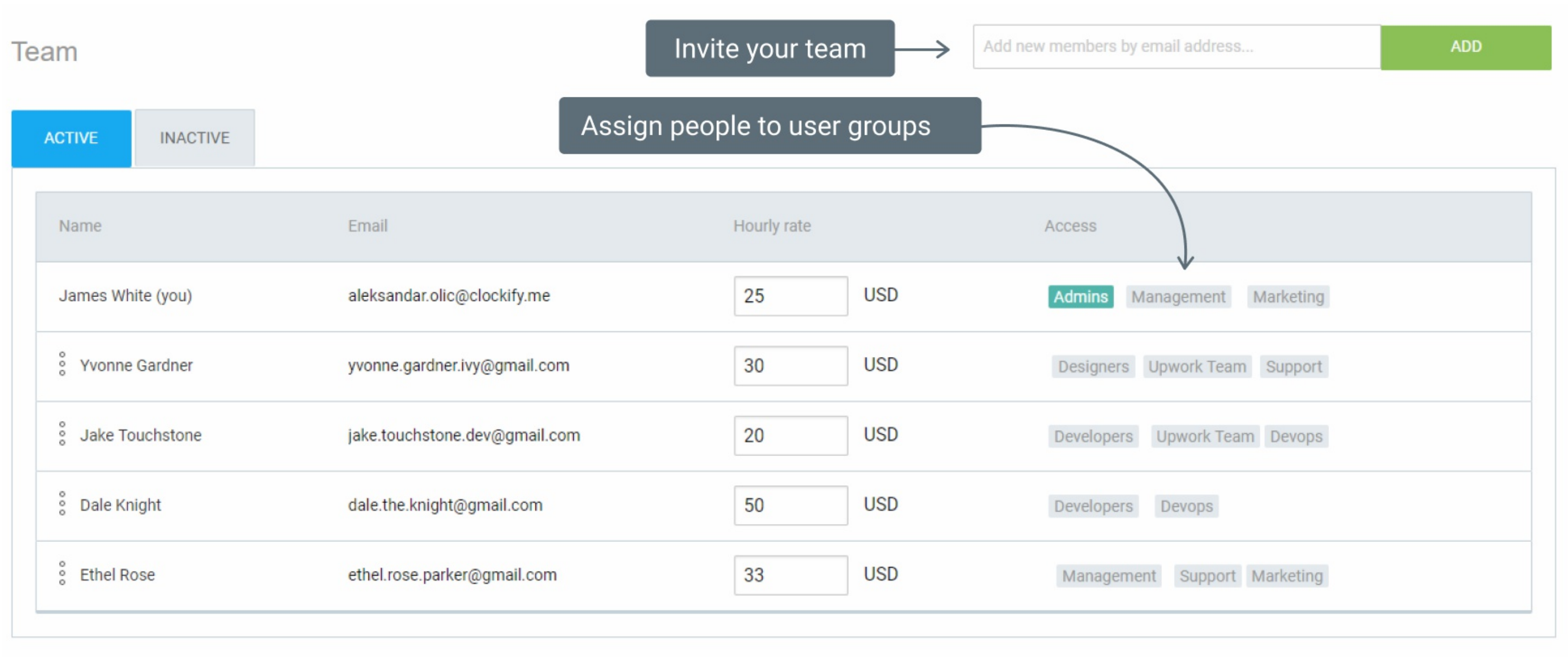


Projects section is where you can set up projects, tasks, assignees, and estimates, as well as see progress across projects.

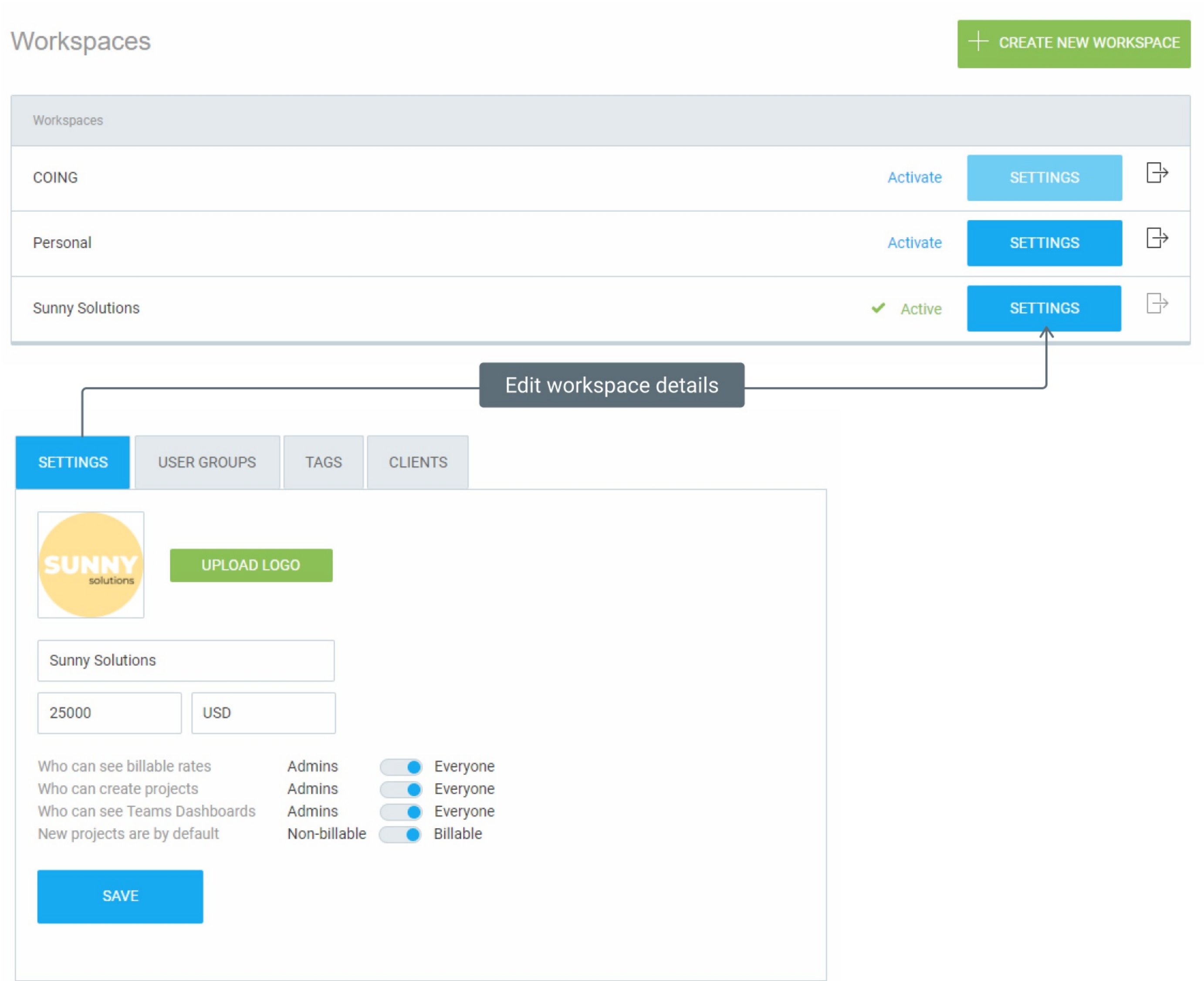



TIME TRACKER
DASHBOARD
REPORTS
PROJECTS
TEAMS
WORKSPACES
Projects
CREATE NEW PROJECT
Clients
Teams
$
Name...
FILTER
Clear filters
Project
Client
Status
Team
Adwords Management
UWO
0 (of 2000 h)
James White, Marketing
Website Development
Big Kahuna Marketing
56.32 (of 80 h)
James White, Developers, Jake Touchstone, Dale Knight
Branding Project
Moon Box
81.20 (of 86h)
James White, Designers, Marketing, Yvonne Gardner
See project status
Branding Project
Tracked
81.2 h
$ Billable
68.2 h
$ Non-billable
13 h
Amount
2387 USD
$
Task
Assignee
Estimation
Percentage
$
Wireframing
James White
0.00 USD
Branding
Yvonne Gardner

Teams section is where you invite team members, define hourly rates for each person, and manage who belongs to what user group.



Workspaces are useful when you have a lot of people, or want to use Clockify for different purposes, and you don't want things to mix up. You can set up a separate workspace for each company department or separate work from personal. This is where you define tags, clients, and user groups so you can use them when setting up projects and tracking time.



How to use Clockify for...

Tracking billable time and charging hourly rates

When you charge hourly, you need to keep track of time you spend working so you can know how much to charge your clients.

In addition to tracking billable hours, you should also track non-billable time (eg. emails, Skype meetings, preparing invoices, etc.) so you can see how much billable vs non-billable activity you do and how that affects your earnings.

Let's say you have a new client and you want to track your hourly rates. Here's what your Clockify workflow would look like:

1. Define your personal hourly rate in Team section.

2. Define client's name in Workspaces > Settings > Clients.

3. Create a new project in Projects and select the client. If you want, you can also set up:

    - Tasks, so you can select them when tracking time and later group time entries by task in reports

- Estimates, so you can compare estimated vs tracked time on projects
- Hourly rate, so Clockify can use a different hourly rate when calculating how much you’ve earned working on that particular project

4. When you start working, type what you're working on, select the project, click $ to mark time as billable, and start the timer

5. Stop the timer when you stop working and the time will be added to your timesheet

6. When you continue working on something, press play icon next to the appropriate time entry and all data will be copied and ready for you to start the timer.

7. When you're having a meeting with the client, start the timer, type "Meeting", choose project, and mark time as non-billable. By tracking non-billable time such as this, you'll have a more realistic picture of how much time you're really spending on the client (and not just the time you bill). You can also add a "meeting" tag so you can filter time entries by tags in Reports.

8. Clockify calculates the total time you tracked so you know when it’s time to

call it a day.

9. When it comes to bill your client at the end of the month, go to Summary report, select "This Month", the project (or only the client if you want to bill for multiple projects you do for them), show only billable time entries, and click Filter to see time entries you need to invoice.

10. Group by Project and subgroup by Time Entry to make data breakdown more useful.

11. Export the report with detailed time breakdown in PDF and send it to your client for review. Or, create an invoice (using invoicing software or a Word template), multiply Total Time by your hourly rate, and send.

12. If you have clients who want to see how much time you've tracked at any point, you can save a report, get public link to it, and send it the client. They can then visit the report at any time and see what work has been done so far on their projects. To do this, go to the Summary report, apply the filters you need, and click save. Under Saved Reports you'll get a link you can copy and send to the client.

13. If you need to "forgive" and write-off some time entries, you can go to the Detailed Report, use filters to find the time entries you want to write off, and directly edit them (in this case, mark them as non-billable).

Keeping track of fixed rate projects and their profitability

If you charge a flat rate for a project, you still need to track time so you can see how accurate your estimates are and whether the project is profitable. By knowing the real length of the project, you'll know if you're charging enough or if you're losing money.

For example, you might tell a client you need 50 hours for a project, 20 for design and 30 for coding. So you arrange a fixed price, thinking you'll finish it in under 50 hours. But how much time will you really need? The bigger the project, the greater the error will be.

But if you track time, you'll know exactly how much time each activity takes and whether you made money on a project. Let’s say you finish the project in 70 hours, which is 20 hours more than estimated. You can negotiate with the client for higher price or less work. But even if charge as if you had worked 50 hours, at least you’ll estimate better in the future and won't lose money.

Let's say you start a new fixed-fee project. Here's what your Clockify workflow would look like:

1. Define client's name in your workspace Settings > Clients. You can also define tags with type of activities (eg. "project management") so you can filter time entries by tags and track how much time each activity takes.

2. Create a new project and select the client.

3. Add tasks to the project (eg. Design, Development)

4. Use task-based estimate (eg. Design task: 20h, Development task: 30h) or enter manual estimate (eg. 50h for the whole project)

5. When you track time, make sure each time entry has a project and a task.

6. When you hit some milestone (eg. finished design), check project status for estimated vs tracked time. If you're way over estimation, you might want to talk to the client about adjusting the budget, requirements, and timeline.

7. Once the project ends, go to Summary report and filter entries by the project. Then, export the report in CSV and import it to Excel where you can: better analyze data, see what activities took longer than planned, analyze why, and set better estimates (and prices) in the future.

Tracking time your team spends working for a client

In companies where teams work with clients, everyone needs to track time. Then, managers can track how much time the company as a whole spends on each project. This is important for billing, payroll, and tracking profitability.

Clockify can show you:

- time each team member spends on a project
- activity of each team member
- total time invested in a project

Here's how you can set up Clockify so your team can track time:

1. If you don't have many employees, you can have one workspace for everyone. But if you're a bigger company, you can use multiple workspaces to keep things from mixing up (as each workspace has its own settings, members, time entries, and everything else). You can go to Workspaces and create a new workspace for each department or company subsidiary.

2. In workspace Settings, upload the company logo and set up permissions.

Depending on what's your company's privacy policy, you can make everything public or private. For example, you can limit project creation rights to only workspace administrators to keep things tidy, or hide billable rates if that’s sensitive information.

3. Define user groups (eg. designers, managers) so you can assign whole teams to a project instead of adding each person one by one; so when someone arrives/leaves, you can just add/remove them from the user group instead of going through each and every project.

4. Define tags so people can tag their time entries with the type of activity they're doing. Then, you can run reports and filter by tag if you want to know how much time activities take.

5. Add client names. If you're not in a client business, you can use this for something else (eg. some activity) to make categorization easier as all time entries are categorized by client and project, where a project can have one client but a client can have multiple projects.

6. Go to Team section, enter emails for each team member, and add them one by one. Then, they'll get an email with an invitation to your workspace. But

before they can accept it, they'll need to sign up and create a Clockify account (the email with which they create an account and the email you used to invite them need to be the same). Once they have their own Clockify account, they'll get a notification, asking them to join your workspace. Once they accept, they can switch workspaces and start tracking time.

7. Set who is in what team in Team section. A person can be in multiple teams or in none. You can also set personal hourly rates if you charge clients different rates, depending on who works on what (eg. a senior developer might have a higher rate than a junior).

8. Create a project, assign its client, and add tasks (and assign people to them if needed) so people can track time against tasks.

9. Add team members to the project. You can add individual members one by one, or add user groups if you defined them.

10. Now that all is set up, your team can start tracking time. They can start a timer or add time manually at the end of the day. To each time entry, they should add a project/task, billability status, and describe what they're

working on in one short sentence. They can also add tags if you have some specific workflow for organizing data (eg. use tags to describe type of activity).

11. To invoice your clients at the end of the month: go to Summary report, filter out by client and billability, select “This Month” for time period, group time entries by project and subgroup by task (or time entry), and export the results. Or, if your client wants to check how much time you've worked at any point, save a report and send the link to your client so they can generate reports on-the-fly.

12. You and your team can use the Detailed report to see time entries that miss data, eg. entries that are missing description or a project, and fill the missing data. This will make your reports much more accurate. You can filter entries (just like in Summary report), the only difference is that you can directly edit time entries in the Detailed report (while in Summary report you can just view and group them).

Managing team productivity

The bigger your company is, the harder it gets to keep track of everything. With Clockify, you can track where each team and person spend their time, analyze data, and come up with improvements.

For example, you might notice that some internal project took 100 hours, which is way more than you estimated. Once you know that, you can ask the team why that is, reevaluate priorities, and come up with a better plan. You might decide to put more people on a project or cut some activities so you finish on time and within budget.

Here's how you can manage your team's productivity in Clockify:

1. Set up workspace, tags, user groups, and projects, and then invite team members so they can start tracking time. (For more info, check the "Tracking time your team spends working for a client".)

2. As your team works, check the Team Dashboard to see who tracked the most time and which projects are the most active.

3. Run a Summary report at the end of each month, quarter, and year to analyze where you spend time. You can analyze internal processes, see what type of work takes most of the time, and think about what you can do to optimize company productivity.

4. Run a Detailed report and filter entries that are missing a project or a tag so you can directly edit them to make reports more accurate.

5. Go to the Weekly report at the end of each week and group time entries by user to see if everyone filled their 40 hours/week quota.

6. Save a report with filters you frequently run so you don't have to set filters each time you need a specific report.

7. Export a report in CSV and import the CSV into a spreadsheet so you can apply conditional formatting to better analyze data.

8. You can give report access to your payroll staff so they don't have to chase each person for data - they can just run a Summary report and filter by user and time period.

9. Define hourly rates in Teams section so Clockify can calculate how much each employee costs you. Once you see how much each person costs, you can compare the cost to how much value you get and see if you can use their skills better on a different project.

10. Once a project is about to end, you can evaluate how much time you've spent, multiply the time by each employee cost, and compare the number to how much profit you actually made.

We hope we gave you some useful ideas on how you can get the most out of Clockify.

If there’s anything you’d like to know or suggest, send us an email at:

support@clockify.me

Enjoy using Clockify!