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Introduction

We've had many requests for the ability to Import Clients, Projects, Tasks and Expenditures, but until now, we did not have a good way to do this. Starting with the iPad and any device upgraded to iPhone OS 4 (or greater), you can now email yourself a Tab delimited CSV file for import. We have included the CSV templates for each of these types. All you need to do is remove the sample entries and include all of your own.

Feedback

We encourage all users to provide us with comments, ideas, or improvements you would like to see in our software. Please do not hesitate to write to: info@on-core.com with any comments, requests, or simply to encourage us to build more great software.

Technical Support

Please email us at: support@on-core.com with any issues. We will contact you as soon as possible to help you resolve any problems. Our technical support line is available Monday through Friday, from 10 AM to 6 PM Eastern Standard Time.

How it works

Before importing any data, we highly recommend doing a full backup with our free Time Master Central application. If something doesn't import correctly, it is much easier to restore from the backup rather than fix it afterwards.

Using the supplied templates, you can import the following data: Clients, Projects, Tasks and Expenditures. You can open the templates in a spreadsheet program such as Excel, Numbers or whatever program you find easiest for working with Tab delimited text files. You will want to remove our sample data from the first data line. Do not change the header information (first two lines). Once the file is filled in and saved, you will email the file to your device. In the email on your device, simply tap on the attachment in the email. The device will now ask you which program you want to open the file with. Select *Time Master* from the list of programs. This will launch Time Master and then Time Master will ask if you want to Import the file. Tap on *Yes*. Time Master will then process the file and report on how many records were imported.

There are a few things to keep in mind when you are importing. Since Projects are tied to Clients, the Client records **must** be imported **first**. The Client Name in the Project **must** match the Client Name that was previously imported. Tasks that are tied to a Project **must** be **after** importing the Projects. Tasks without a Project will be imported as Global Tasks.

If any of the mandatory fields are not properly filled in, the record will not be imported. Here are the mandatory files and fields:

Clients: Name
Projects: Name, Client
Tasks: Name, Project (only if tied to a Project)
Expenditures: Name

Other mandatory requirements and notes:

- File must be Tab delimited.
- File name must have the ".txt" extension.
- Must use the format defined in our templates.
- Existing items will not be overwritten or updated.
- If the Client is "Taxable", you will have to edit the Client in Time Master and select the appropriate Taxes.
- You may need to specify the "Terms" for the customer.
- You cannot create/import Odometer Expenditures. They must be created manually.
- If an Expenditure is not "Reimbursable", you will have to manually un-check it.

Hopefully that will be enough to get you going. If you have questions or problems, please contact us at the information above.