



FinClock Guide: Account Setup

Take 5 minutes to complete these setup steps and start organizing work.

Step	Status
1. Add Work Shifts	Done
2. Add Job Categories	Done
3. Add Departments	Done
4. Add Work Locations	Done
5. Add/Invite People	Done

1. Add Shifts
2. Add Job Categories
3. Add Departments
4. Add Work Locations
5. Add/Invite People



Step 1: Add Shifts.

On the **Settings** page, Start by clicking the **Add shifts** button

- Add the Name of the shift e.g. Morning Shift A.
- Select the start and end date of the shift.
- Select the Shift session (morning, Afternoon, Evening or Night)
- Select the **start and End time** for the shift
- Select the Lateness time e.g. Give the people 5 minutes allowance and past that time, they will be marked late.
- Click Submit when done.
- Click **Next Step** to proceed to Step 2.

Step 1: Add Shifts Details (Enter name, select shift details and click submit)

Shift Name:

Start Date: [Clear](#)

End Date: [Clear](#)

Shift Session:

From Time:

To Time:

Lateness Time:

Shift Name	From Time	To Time	Action
Morning Shift 1(morning)	08:00 AM	05:00 PM	<input type="button" value="More"/>
Morning Shift 1(morning)	08:00 AM	05:00 PM	<input type="button" value="More"/>

Step 1 of 5



Step 2: Add Job Categories

- Add the job category name e.g. Human resource manager, Operations manager etc.
- Click submit to save the job category
- Click **Next step** to proceed to Step 3

Step 2: Add Job Category (Enter Category e.g. "Director" and click submit)

Job Category Name:

✓ Submit Cancel

Job Category Name	Active	Action
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Step 2 of 5

Next Step



Step 3: Add Departments

- Add the name of a department in your organization e.g. Finance, Human Resource etc.
- Select the Job categories that should be under the department's name e.g. Accountant can be under the Finance department.
- To select multiple departments, hold the CTRL key.
- Click submit to save the department details.
- Click **Next step** to proceed to step 4

Step 3: Add Department (Enter department name e.g. Operations and select categories under it)

Department Name:

Job Category:

Department Name	Job Category Name	Active	Action
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Step 3 of 5



Step 4: Add Workstations or Work Locations

Workstations or posts are the office locations in your organization.

- Type the name of the location e.g. Company A Main office
- Set the allowed clocking radius in meters (if someone marks attendance outside the set radius, the hours worked are considered Off-location)
- Type the location address and select the location from the list.
- Click the **Set location on map button** and the Address will auto pick in the map.

☰ Add Work location

[Back to Register setup](#)

Enter Workstation Name: Allowed Clocking Radius (In meters):

Enter Location's Name and click set location on map:
 [Set location on Map](#)

Map **Satellite**

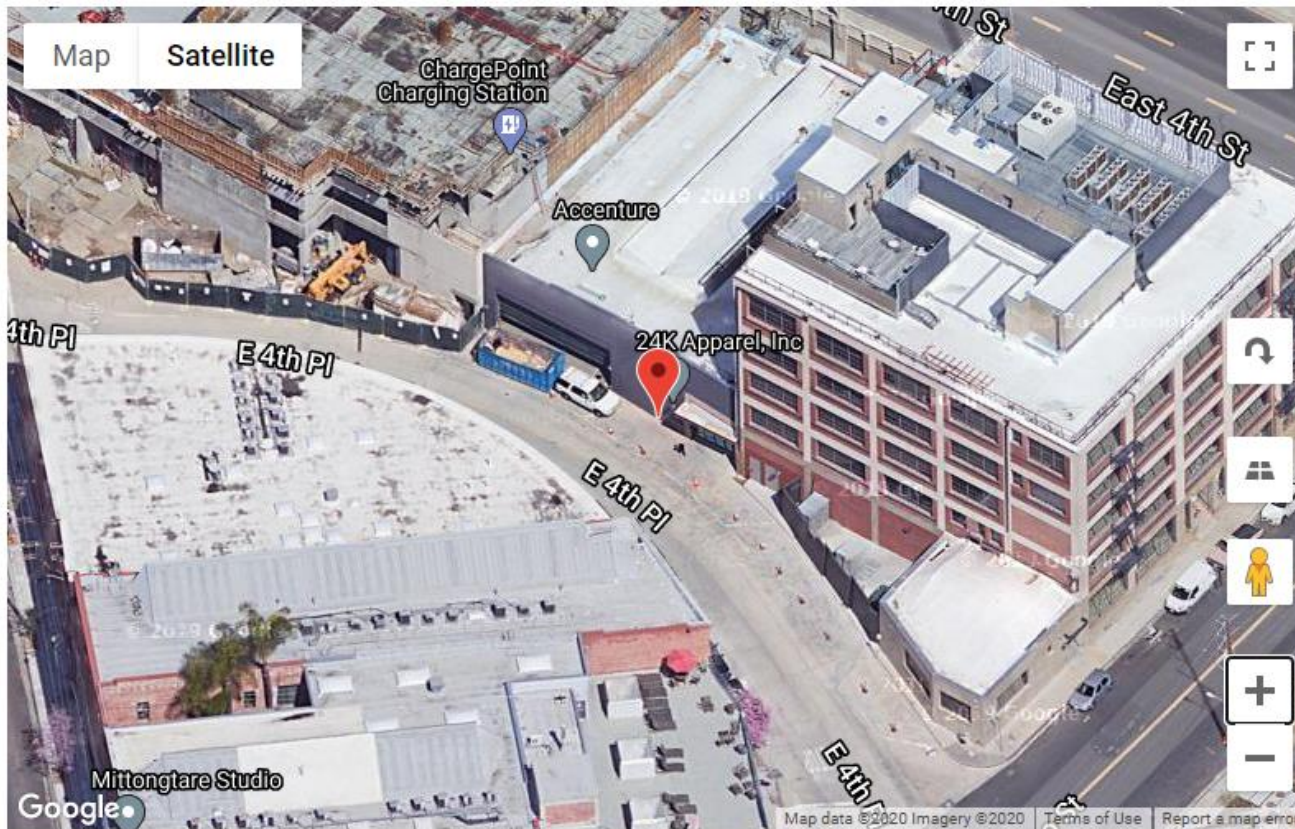
Map controls: Map, Satellite, Full Screen

Map labels: Solvang, Santa Barbara, Ventura, Oxnard, Los Angeles, Lancaster, Palmdale, Victorville, Apple Valley, Hesperia, Barstow, Los Padres National Forest, Angeles National Forest, San Bernardino National Forest, Channel

[Next Step](#)



Step
4 of 5



Next Step

- Confirm details and **Click Submit**
- Click **Next step** to proceed to **Step 5**



Step 5: Add/Invite Staff in Your organization.

Invite Staff Member

- Fill the person's details: Names, Email, phone No & Post.
- When you Submit, the person gets Email and SMS invite with login email and password.

Add People

Add/Invite Staff

Staff Register

Edit Requests

Registration Requests

Manage People

Shift Management

Leave Management

Team Management

Account Setup

More Settings

Download mobile App

Setup Guide

Logout

Staff Basic Details

Surname: Doe

Other Names: John

Email: johndoe@company1.com

Mobile No: (+,country code,number) 2028559609

Id No/Passport: 123456789

Work Location Details

Post:

- Select Post -

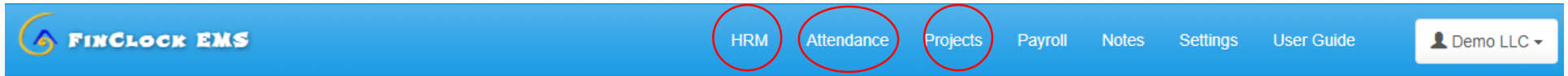
Company Headquarters

Import Download Demo File

Invite Cancel



Next Step?



- You may choose to Mark Attendance under the [Attendance menu](#)
- You may choose to add your first project and assign people tasks Under [Projects Menu](#)
- You may proceed to manage your Staff register under the [HRM menu](#)
- You may check the latest notifications under [Notes Menu](#)
- If you have access rights, you may proceed to **the** [Payroll menu](#).

Need Help? Please follow this link to book A meeting with the Support team

[Book a Meeting](#)