



## FinClock Guide: Account Setup

**Goal:** To complete the setup in 10 minutes, and start using Finclock in your business.

The screenshot displays the FinClock Account Setup interface. At the top, a blue navigation bar contains the FinClock logo and links to HRM, Attendance, Projects, Products & Services, Payroll, Settings, and User Guide. A user profile dropdown shows 'Demo LLC'. On the left, a 'USER MENU' sidebar lists options: Hr Dashboard 2, Add/Invite Staff, Manage People, Shift Management, Leave Management, Account Settings (highlighted), Setup Guide, and Logout. The main area features a progress bar with six colored steps: 1. Add/Invite People (black), 2. Add Job Categories (orange), 3. Add Departments (green), 4. Add Tasks (purple), 5. Add Work Locations (blue), and 6. Add Work Shifts (orange). A large blue circle in the center states '6 of 6 Steps Completed'. To the right, a table lists the first five steps and their status.

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

1. Add Staff (Team)
2. Add Job Categories
3. Add Departments
4. Create Task Master
5. Add Work Locations
6. Add Shifts



## Step 1: Add/Invite Staff in Your organization.

### Invite Staff Member

- Fill the person's details: Names, Email, phone No & ID.
- When you Submit, the person gets an Email and SMS invitation with login details (username and Password)

Step 1: Quick Tips: 1. Add Employee details and click submit. 2. You may proceed to the next step after you see the message "Invite sent successfully."


Staff Basic Information

**Surname:**

**Other Names:**

**Email:**

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

 ▼

**Id No/Passport No:**

✓ Submit

Cancel

Step  
1 of 6

Next Step



## 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:

Job Category Name	Active	Action
123	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
ABC	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
ABC TEST	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
Backend developer	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>

Step 2 of 6



## 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:

Enter Department Name, then Select the job categories under the department

Job Category:

-- select job category --  
new category  
System analysis  
System Designer  
test  
XYZ

Submit Cancel

Department Name	Job Category Name	Active	Action
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Next Step

Step 3 of 6



## Step 4: Create Task Master (Tasks done under departments in your organization)

**I****I: Common tasks:**

Select **Common tasks** page,  
under Tasks menu.

**II****II: Create Common tasks**

Click **create task** button to open a  
popup, where you will add tasks  
under departments.

Projects Home Task Master tips. 1. Select the Create task button first. Then, select the department and type the task name. The numbers helps to set the order of tasks

Department:

1st Task	2nd Task	3rd Task	4th Task	5th Task	6th Task
Studio Operations	Production	Field Operations	News	Sales	News
<b>Studio Task</b> This task is about making plans for the work in studio	<b>Task for Production</b> this work	<b>Box packaging</b> This involves the packaging of the boxes.	<b>Video tests</b> this is to test a couple of things	<b>A trial task</b> This is a trial task	<b>News Collection</b> this task is about collecting news in the field
7th Task	8th Task	9th Task	10th Task	11th Task	12th Task

**USER MENU**

- Projects
- Tasks
- Task Board
- Assign Tasks
- Task Master**
- Tasks Summary
- Project Costing
- Internal Payments
- Project Reports
- Setup Guide



### III

#### Step 3: Select department and add a task done under the department.

- Example: Finance department, the first task can be 001 Prepare quotations.
- Remember to use the 001 numbers to help you organize the tasks in future.
- You may arrange the order of tasks by clicking the edit icon after submitting the task.

You are now adding a task, commonly done under the department

Department: Finance

Common Task Name: 001 Prepare Quotation

Common Task Description: Preparing quotation after client makes a call

Submit Cancel

USER MENU

- Projects Dashboard
- Projects
- Tasks
- My Tasks
- Assign Tasks
- Common Tasks
- Project Reports
- Setup Guide
- Logout

Common Task / Common Task

Department: - Select Department

1st Task

Studio Operations

Studio Task

This task is about making plans for the work in studio

5th Task

Sales

A trial task

This is a trial task

6th Task

News

News Collection

this task is about collecting news in the field

7th Task

Field Operations

Editorial

Task

+ My Tasks

Demo LLC



## Step 5: 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:

Company Headquarters

Allowed Clocking Radius (In meters):

50

Enter Location's Name and click set location on map:

1019 East 4th Place, Los Angeles, CA, USA

[Set location on Map](#)



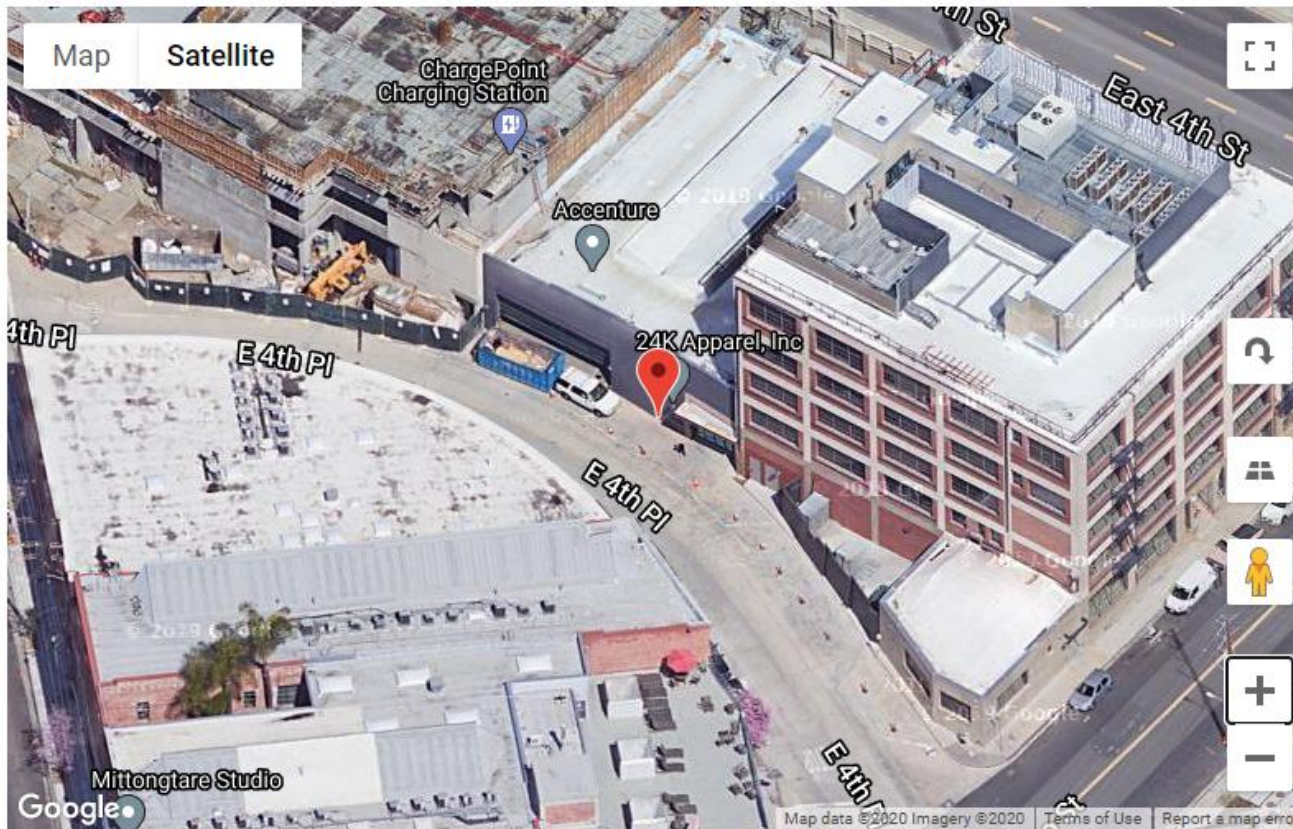
Step  
4 of 5

[Next Step](#)





Next Step



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





## Step 6: 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:

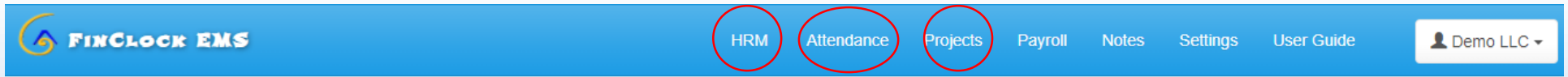
Lateness Time:

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



## 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](#)**