# FinClock Guide: Account Setup

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



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 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 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

**Step 3 of 6**

✔ Submit    Cancel

| Department Name | Job Category Name | Active | Action |
|---|---|---|---|

Next Step

# 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.



**USER MENU**

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

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:

-- Select Departme ⌄    [Filter]  [Clear]

[+ Create Task]    [+ Task Board]

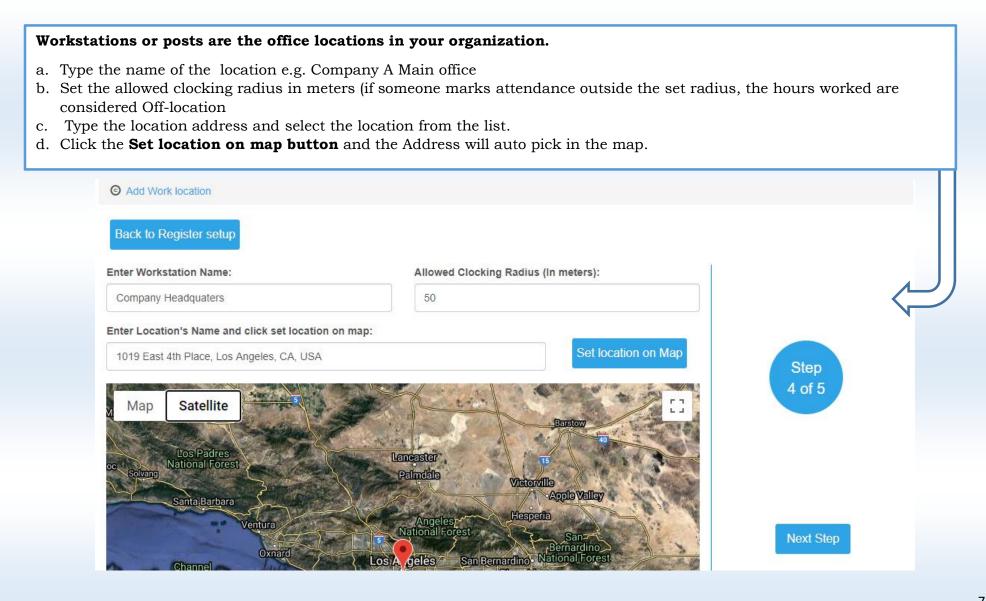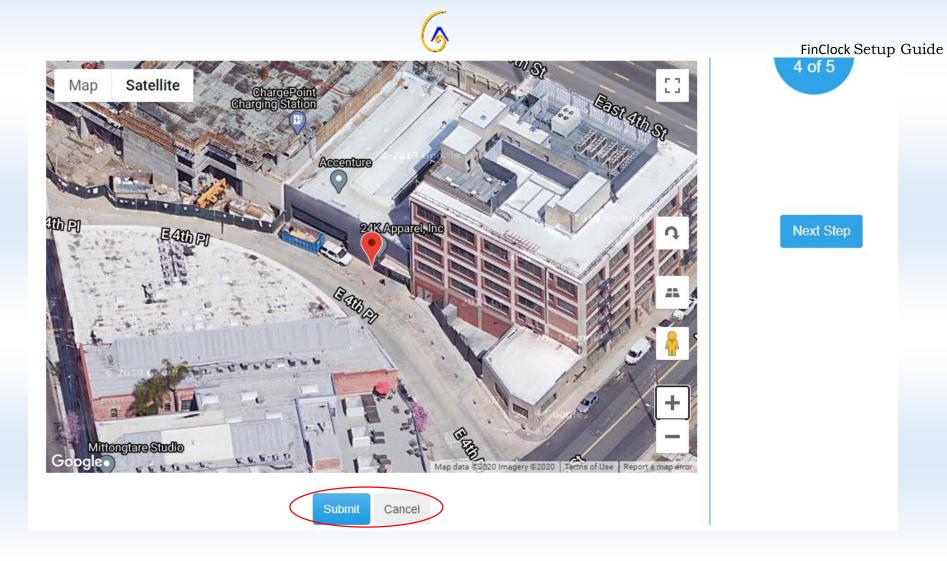| t Task | 2nd Task | 3rd Task | 4th Task | 5th Task | 6th Task |
|---|---|---|---|---|---|
| Studio Operations | Production | Field Operations | News | Sales | News |
| **Studio Task** This task is about making plans for the work in studio | **Task for Production** this work | **Box packaging** This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

# 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.

# Step 5: Add Workstations or Work Locations

**Workstations or posts are the office locations in your organization.**

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



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> ➢ 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**

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

dd/mm/yyyy

End Date: Clear

dd/mm/yyyy

Shift Session:

Please select

From Time:

00     00

To Time:

00     00

Lateness Time:

00     00

✔ Submit    Cancel

Step 1 of 5

| Shift Name | From Time | To Time | Action |
|---|---|---|---|
| Morning Shift 1(morning) | 08:00 AM | 05:00 PM | More |
| Morning Shift 1(morning) | 08:00 AM | 05:00 PM | More |

Next Step