dinvy ascent

TIME TRACKING & INVOICING

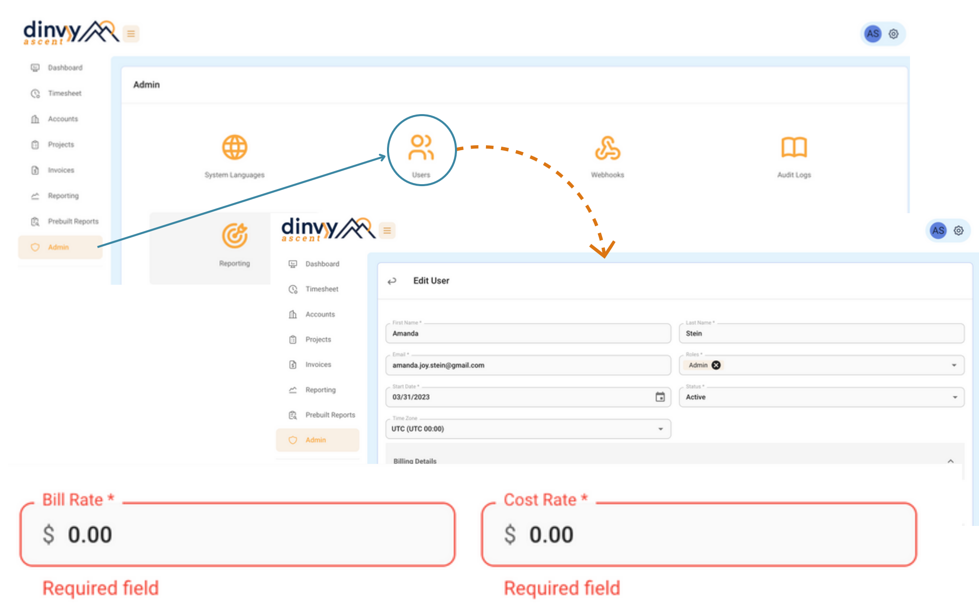
SETUP INSTRUCTIONS

ADMINISTRATION

1) UPDATE YOUR USER COST & BILL RATE*

- navigate to > admin > users
- click to open the User
- scroll to Billing Details and enter Bill and Cost Rates

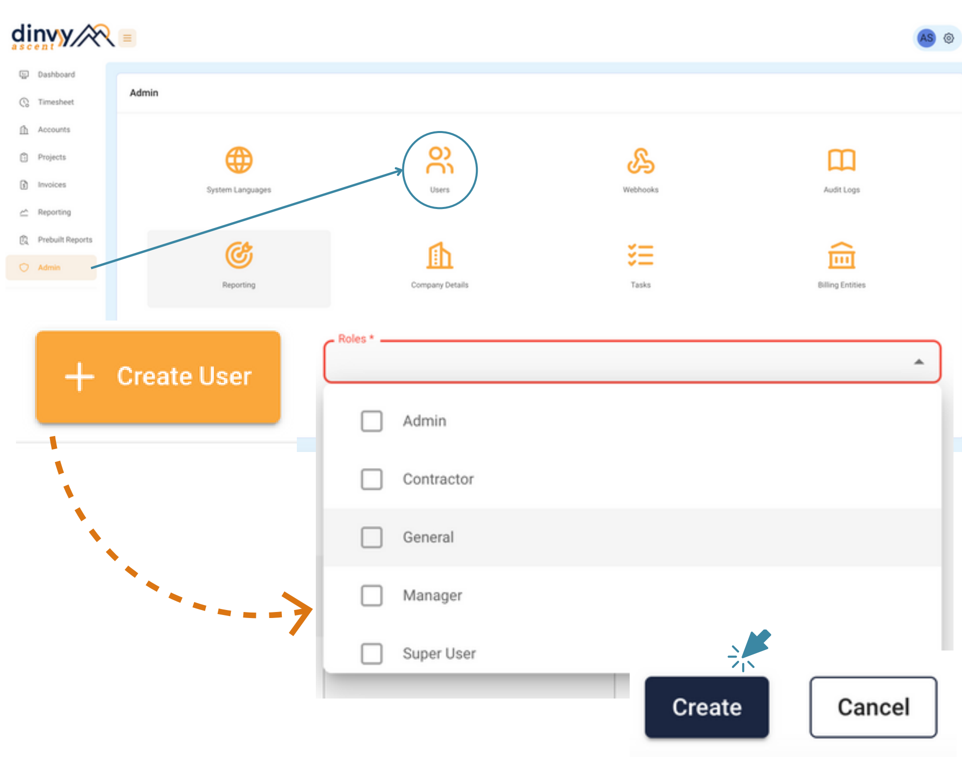
You MUST have a bill rate in order to create and send Time and Material invoices.



2) ADD USERS

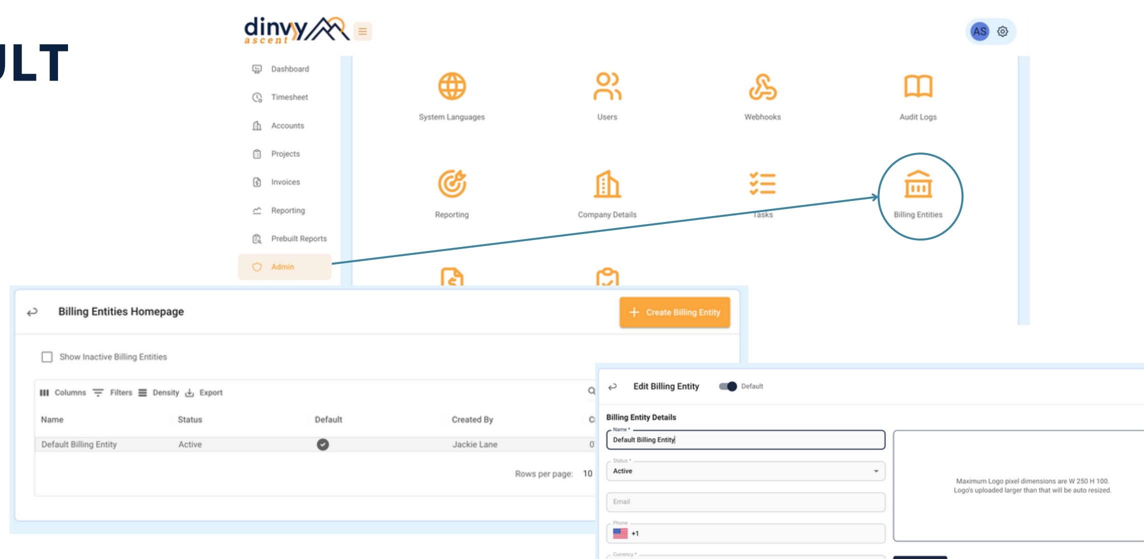
- navigate to > admin > users
- click **"+Create User"**
- add user details
- select their role
    - Contractor/Time Entry - time entry access
    - General/Manager - team member and project access
    - Admin/Super Users - full access w/ invoices
- click create and an email will be sent for them to verify their account.

Note: You are required to enter cost rate for each user. If you don't use cost rate, enter in $1 or an estimate to display profit and margin.



3) UPDATE YOUR DEFAULT BILLING ENTITY

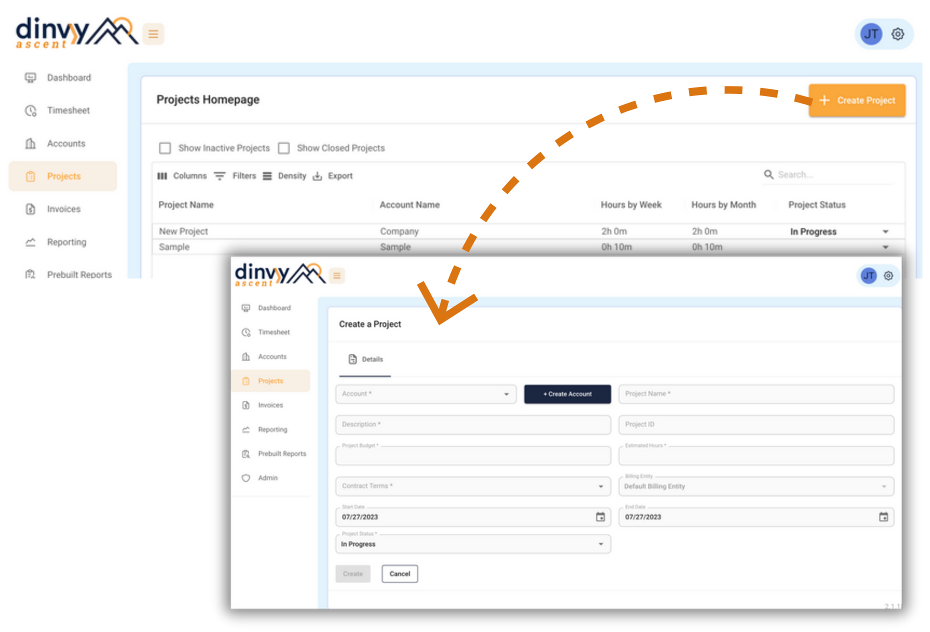
- navigate to > admin >billing entity
- click to on "Default Billing Entity"
- enter your Company Name and Address (this is the information that will appear on your Invoices)
- Upload logo and enter your bank/remittance information



PROJECTS

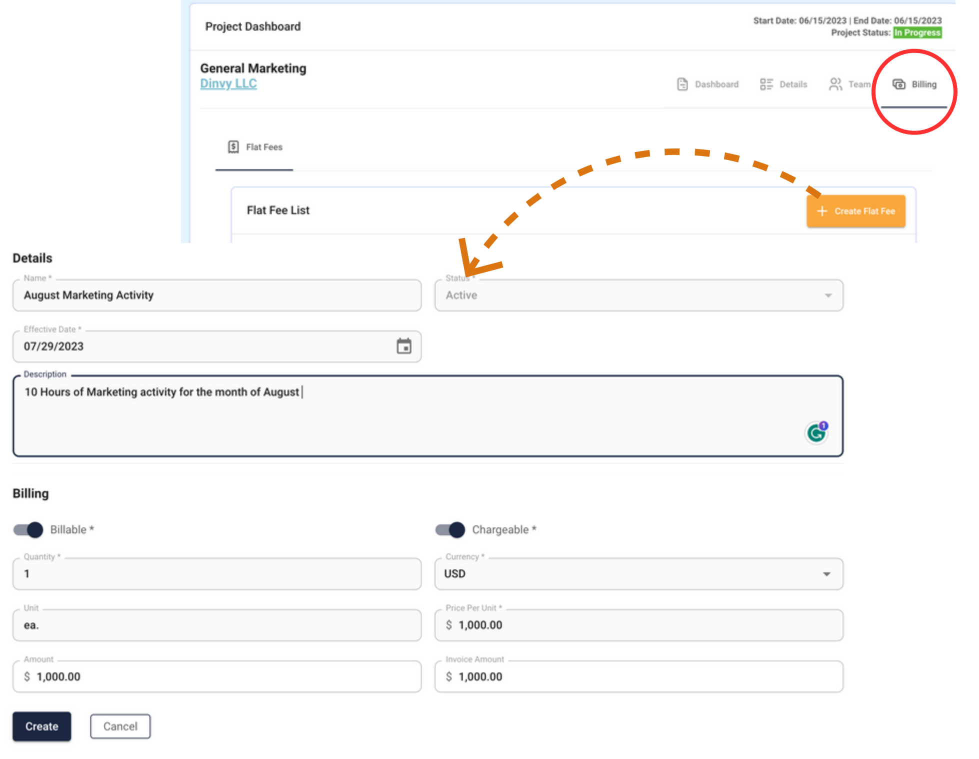
4) CREATE YOUR FIRST PROJECT

- navigate to > projects
- click **"+ Create Project"** button
- add an Account and enter project details
    - description
    - project budget
    - estimated hours
    - your updated billing entity appears here
    - start and end date
- select contract terms (see below)
- click create



5) SET UP CONTRACT TERMS

- **Time and Material**
    - users hours and rates will appear in Invoices
- **Fixed Bid**
    - from your project dashboard, navigate to the Billing Tab
    - click **"Create Flat Fee"**
    - enter Name, Effective Date & Description
    - select Quantity, Currency, & Price per Unit
    - click **"Create"** - *this fee is now available to be invoiced*



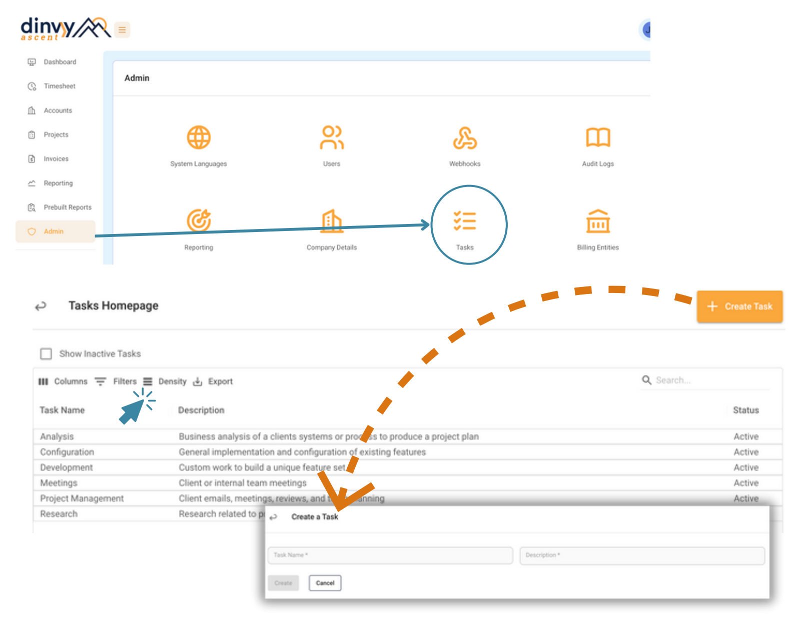
TIME ENTRY

6) EDIT OR ADD TASKS*

**You can skip this step and use the prebuilt tasks if you'd like*

- navigate to admin > tasks
- to edit a prebuilt task click on a task line and update the name and description
- to add a task click **"+Create Task"** and add the task name and description.

Note: the task description is what will appear on your invoices



7) TRACK TIME TO PROJECTS

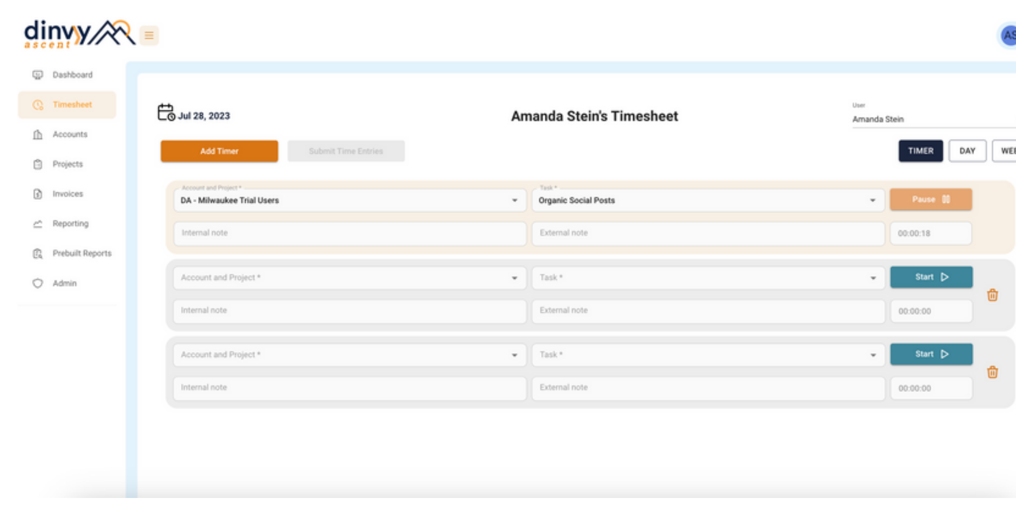
- navigate to > timesheets
- select Timer, Day, or Week

Day/Week Timesheets:

- click **"+Add Record"**
- select an Account, Project and Task
- enter time & click save

Timers:

- click **"Add Timer"**
- start a Timer
- prior to submitting select an Account/Project and a Task
- multiple timers can be added
- start and pause timers as needed
- click **"Submit Time Entries"** to clear the page and add timers to your timesheet
- remember! you can always manually edit your time and date

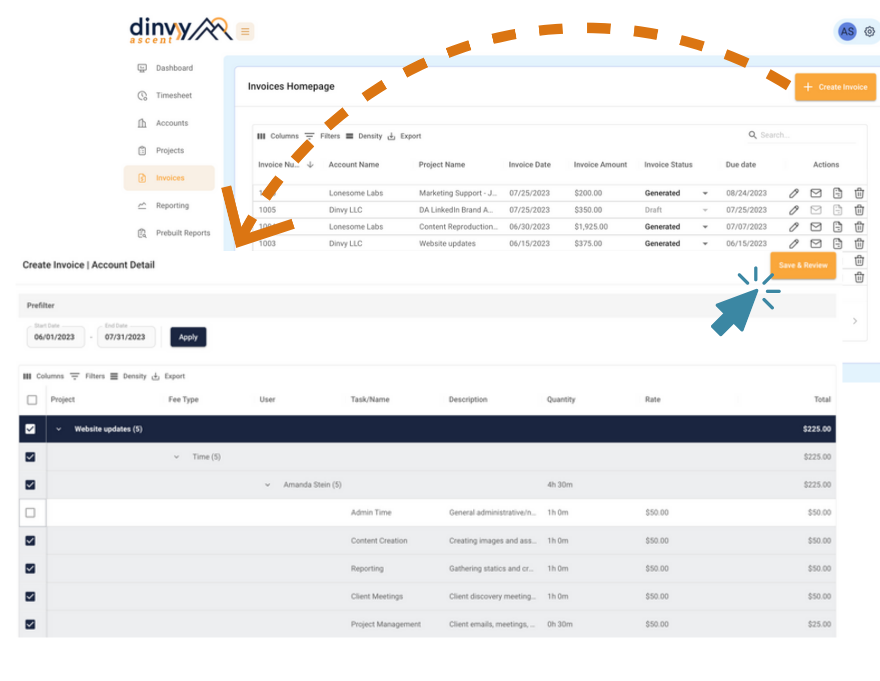


optional - add internal and external notes for reporting

INVOICES

8) CREATE AN INVOICE

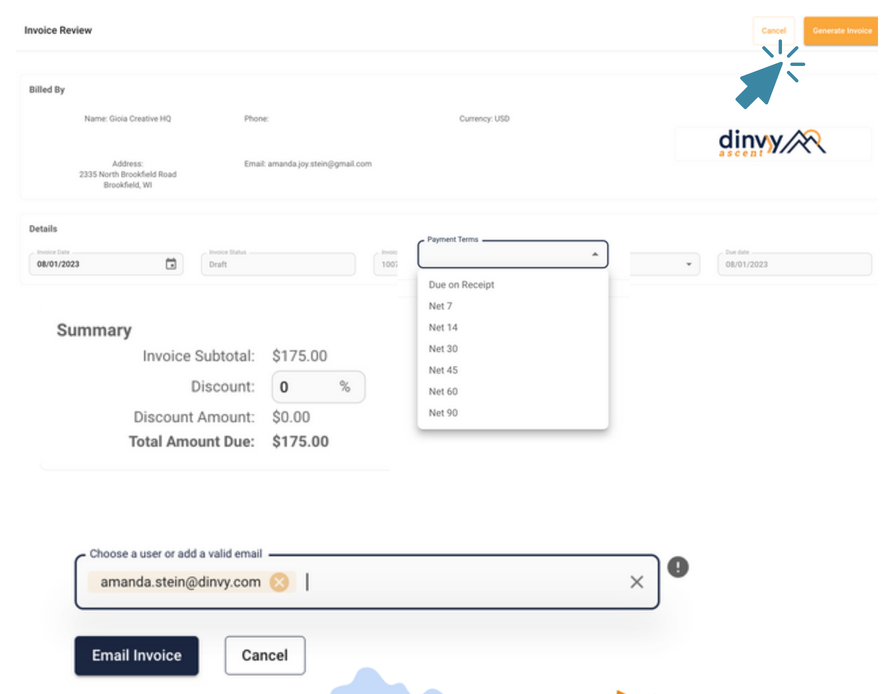
- navigate to > invoices
- click **"+ Create Invoice"**
- adjust dates if needed (default dates are set to the previous month for ease of billing)
- select an Account to bill
- on the Account Detail page, you can
    - Select individual projects
    - Group projects together
    - Select/remove individual line items to add to the invoices
- click **"+ Save and Review"** at the top of the screen



9) GENERATE & SEND AN INVOICE

- on the Invoice Review screen you can
    - Add a discount
    - Set your payment terms
- then, click "Generate Invoice"
- find the newly generated invoice on the Invoices Homepage
- click the envelope icon
- select or enter the billing email address and send!

Note: on your account details page, you can set default invoice recipients that will appear when you're ready to send the invoice.



For additional support

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Or head to our Help Center:
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