TIME TRACKING & INVOICING SETUP INSTRUCTIONS

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.

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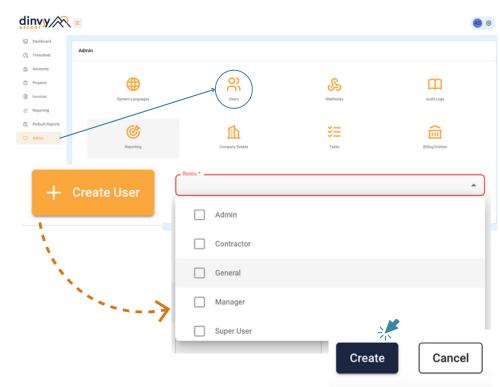
2) ADD USERS

- 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
- Ann

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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

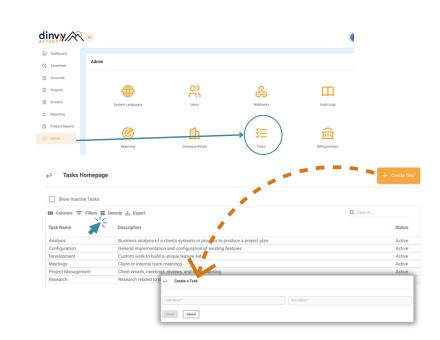
- Time and Material
 - users hours and rates will appear in Invoices
- Fixed Bid
 - from your project dashboard, navigate to the Billing Tab
 - click "Create Flat Fee"
 - enter Name, Effective Date & Description
 - select Quantity, Currency, & Price per Unit
 - click "**Create**" this fee is now available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

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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



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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

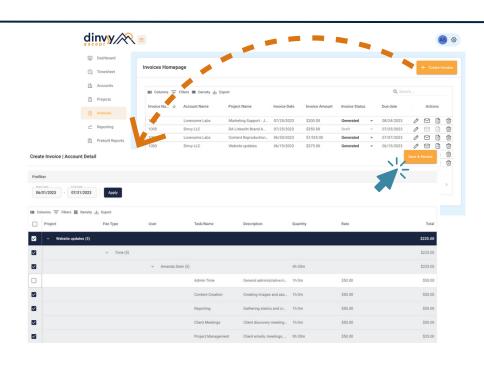
optional - add internal and external notes for reporting

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

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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
- 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.

			Cancel
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For additional support

Reach out to our team via email: help@dinvy.com

Or head to our Help Center: https://dinvy-ascent.freshdesk.com/support/solutions