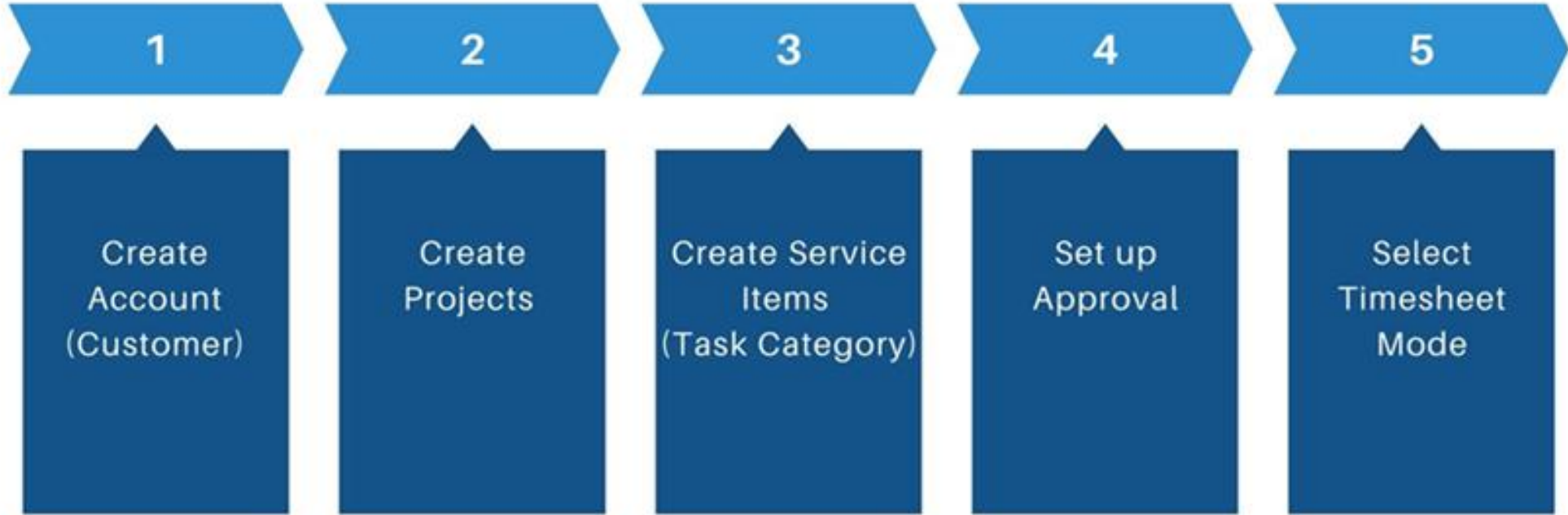


QUICK SETUP GUIDE FOR OFFICECLIP TIMESHEET



Step 1: Create Account(Customer)

The screenshot shows the OfficeClip web application interface. The top navigation bar includes the OfficeClip logo, a 'Feedback' link, and a user profile icon. Below this is a secondary navigation bar with 'Quick Create' and 'Support' dropdowns, a timer, 'OC Test', a notification bell, a help icon, and 'Settings'. The main navigation menu on the left lists various applications: Desktop, CRM, HRM, Timesheet, Expense, Projects (highlighted), Invoices, Time Off, Tasks, Calendar, Documents, Customer Portal, and Service. The main content area is titled 'New Account' and contains a 'Save' button. The form fields are as follows:

Account Information	
Account Number	00123
*Account Name	OfficeClip LLC
Short Account Name	
Parent Account	
Primary Contact	
Relationship Type	Prospect
Web Site	www.officeclip.com
Email Address	ocsales@officeclip.com

Four numbered callouts indicate the steps:

1. Click on Projects (pointing to the 'Projects' menu item in the left sidebar).
2. Click New Account (pointing to the 'New Account' button in the top navigation bar).
3. Enter details (pointing to the '*Account Name' input field).
4. Click Save (pointing to the 'Save' button).

Step 2: Create Projects

Click New Projects

Enter details

Select an account for which you want to create a project

Click on Projects

Click Save

Allocate project to users

The screenshot shows the 'New Project' form in the OfficeClip application. The form is divided into several sections: Project Info, Contact Info, Project Allocation, and Attachments. The 'Project Info' section includes fields for Name (Development), Account (OfficeClip LLC), Project Number (Prj-0007), Project Code, Project Type, and Project Manager (K. Deepa). The 'Contact Info' section includes fields for Project Contact, Telephone, Date Started (7/26/2021), Expected End Date (9/30/2021), Project Status (Active), % Complete (0), Budgeted Hours, and Budgeted Amount. The 'Project Allocation' section includes a dropdown for 'Allocate Project to' (deepa@officeclip.com(Deepa K)), a checked checkbox for 'Send email notification to allocated members', and an 'Attachments' section with a 'Select' button. The form has a 'Save' button at the bottom left and a 'Cancel' button next to it. The OfficeClip logo is in the top left, and the 'Feedback' link is in the top right. The 'New Project' button is highlighted in the top navigation bar.

1 Click on Projects

2 Click New Projects

3 Enter details

4 Select an account for which you want to create a project

5 Allocate project to users

6 Click Save

Step 3: Create Service Items(Task Category)

Click on Timesheet (1)

Click Admin (2)

Click Service Items (3)

Enter the Code (4)

Enter Service items or tasks related to project (5)

Select Account/Project for the task (6)

Select whether the task is billable, non-billable, or both (7)

Click Save after making changes (8)

Week Starting	Name	Emp Id	Status	Total	Comments	Org	Actions
2021-07-19	K. Deepa	OC001	Saved	18:00		OC Test	
2021-07-12 New!	K. Deepa	OC001	Saved	39:00		OC Test	
2021-07-05	K. Deepa	OC001	Approved	42:00		OC Test	

SI Code	Service Item(SI) Name	Is Billable?	Account/Project	Actions
		No	-- All --	
S11	Accounting	Yes	-- All --	
S12	Analysis	Both	-- All --	
S13	Quality Assurance	Both	-- All --	
S14	R & D	Yes	-- All --	
S15	Sales	Yes	-- All --	
S16	Meeting	No	OfficeClip LLC:Meeting	

Step 4: Set up Approval

Go to Timesheet > Admin
and click on Workflow

Workflow Setup

Setup the Timesheet Workflow on this screen.

Select All | Clear All

Member	Workflow Route	Notify
<input type="checkbox"/> K, Sara (sara@gmail.com)	Manual Routing	None
<input type="checkbox"/> K, Deepa (deepa@officeclip.com)	Manual Routing	Approved
<input checked="" type="checkbox"/> M, OC (ocmarketing.45@gmail.com)	Manual Routing	None
<input type="checkbox"/> Sales, OC (salesoc1234@gmail.com)	Manual Routing	None

Checkmark the user for whom you want to create a workflow

After selecting the user, click Setup



Step 1: Select Type of Routing

- Disable Routing (Do not allow creation of the timesheet for selected User(s))
- Manual Routing (Timesheet can be routed to an authorized person in the organization for approval)
- Single Person Automated Routing
- Two Person Automated Routing
- Three Person Automated Routing

Submit To: K, Deepa (deepa@officeclip.com) (Final Approval)

Step 2: Set Communication Options

Notify Users if:

- Approved
- Rejected
- Submitted

Applicable For:

M, OC (ocmarketing.45@gmail.com)

Save Cancel

Select the desired type of routing for approval

Select the Approvers

Checkmark the desired checkbox for notifications

Click Save after making changes

Step 5: Select the Timesheet mode

Go to Timesheet > Admin. In the Admin section, click on Profiles

The screenshot shows the OfficeClip software interface. At the top, there is a navigation bar with 'OfficeClip' logo, 'Feedback', and user settings. Below this is a secondary navigation bar with 'Quick Create', 'Support', a timer, and 'OC Test'. The main navigation menu includes 'Applications', 'Desktop', 'CRM', 'HRM', 'Timesheet', 'Expense', 'Projects', 'Invoices', 'Time Off', 'Tasks', 'Calendar', 'Documents', 'Customer Portal', and 'Service'. The 'Timesheet' menu item is selected. The main content area is titled 'Timesheet Profiles' and has tabs for 'Mode', 'Layout', 'Features', 'Functions', 'Work Days', and 'DCAA'. The 'Mode' tab is active, and a dropdown menu is open, showing 'Periodic' (selected) and 'In/Out'. Below the dropdown, there is a section for 'Auto Check Out After' with a description: 'Auto checks out after selected hours if the user forgets to check out the timesheet'. At the bottom of the configuration area, there are 'Save' and 'Cancel' buttons. A 'Save & Next' button and a 'Save' button are also visible in the top right corner of the main content area.

1

2

3

* For manual timesheet entry select the Periodic mode.

* For Check-in Check-out timesheet entry, select the In/Out mode.

Click Save