

Minute7[®] Setup Guide

Objectives	2
Terminology/ Data Definitions	2
Adding Employee, Vendor and Users to Minute7	4
Employees	4
Vendors	5
Users	6
Adding Data for Time Tracking	7
Customers	7
Payroll Items	8
Items (Service)	8
Adding Data for Expense Tracking	10
Vendors/Merchants	10
Items (Inventory)	11
Accounts	12
General Accounts	12
Payment Accounts	13
Enabling Features	14
Turn On Time Entry for Vendors	14
Turn on Payroll Items for Time Entries	14
Setting Up Permissions	14
Account Permissions	15
Time Permissions	16
Expense Permissions	16
User Restrictions	17
Permission Groups	18

Minute7® Setup Guide

Objectives

To offer a stand-alone time and expense tracking system, independent of any accounting or payroll solution. This empowers organizations to fully customize the tracking process for both time and expenses, tailored to your workforce needs.

Terminology/ Data Definitions

The data terms below are considered **Resources** in Minute7. Each of these resources are completely customizable.

Employee W-2 employees who will need to complete a Minute7 timesheet or expense entry.

Vendor 2 types of vendors can be created in Minute7.

1. **1099 users, contractors or subcontractors** that will be entering timesheet or expense entries can be entered as Vendors in Minute7
2. **Merchants or retailers** that should be accounted for when employees or contractors are entering **expenses** in Minute7.

Users Minute7 offers user accounts that can be accessed by using a username (email address) and password. These accounts can be created for different types of users, including Employees, Vendors, Account Administrators, and Group Managers. When creating Employees or Vendors within Minute7, user accounts are automatically generated.

Customers Used to track clients, job codes or projects. The Customer field in Minute7 can be multi-tiered up to 3 levels. Minute7 users can track time and expense entries against items entered in the Customer field. This field is not required for time or expense entries.

Service Items Used to track labor categories or activities. Items are the products and services a business buys and sells. Minute7 allows for two types of items to be entered.

1. **Service Items** are for tracking services a business provides to customers. Service items are part of the **timesheet** functionality within Minute7.
2. **Inventory Items** are products a business sells and wants to track the quantity of. Typically, a business creates or buys these items, holds them “in stock,” and then sells them to customers. Inventory items are part of the **expense tracking** functionality within Minute7.

Payroll Items Used to identify various types of payroll hours entered by users adding **timesheet** entries. The 3 types of Payroll Items are below:

1. **Regular Hours** - examples of regular hours are: Hourly, Salary, Direct Labor, Overhead, etc.

Minute7[®] Setup Guide

2. **Overtime Hours** - examples of overtime hours are: overtime, double overtime, shift diff, etc.
3. **Leave Hours** - examples of leave hours are: PTO, Vacation, Sick, Holiday, Jury Duty, etc.

Accounts Categories used for tracking expenses. There are 2 primary types of accounts that can be used in Minute7 when tracking **expenses**.

- **General Accounts:** help you break down your expenses into “categories” so it’s easier to manage your company related expenses. General Accounts can be identified as the following Account Types:
 - a. Assets
 - b. Expenses
 - c. Income
 - d. Liabilities
- **Payment Accounts:** allow you to record expenses tied to credit cards, bank accounts or digital wallets.

Minute7[®] Setup Guide

Adding Employee, Vendor and Users to Minute7

Employees

Used in Minute7 to track W-2 employees timesheet or expense entries.

To add a new employee in Minute7, follow these steps below

1. Click the **Sign In** button on <https://minute7.com>
2. Navigate to to the Settings/**Resource Settings** tab
3. Click the **Employees** tab
4. Click the link **Create New Employee** and enter the following information
 - a. First Name
 - b. Last Name
 - c. Middle Name
 - d. Email (*must be unique*)
 - e. Employee Number (*must be unique/optional*)
 - f. Payroll Item (List of payroll items that will show up as options on the employee's timesheet). Multiple items may be selected.
 - g. Add as a User checkbox - selecting this box will automatically create a user account for this employee.
 - h. Permission Settings - default permissions will allow a user to add and edit their timesheet entries
5. Click the **Save** button to complete the process of adding a new employee.

Create New Employee

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Middle Name	Email *
<input type="text"/>	<input type="text"/>
Employee Number	Payroll Item
<input type="text"/>	No Payroll Item Selected ▼
<input checked="" type="checkbox"/> Add as a user ⓘ	
Permission Settings ⓘ	
<input checked="" type="radio"/> Default	
<input type="radio"/> Customized	
<input type="button" value="save"/>	<input type="button" value="Cancel"/>

Minute7[®] Setup Guide

Vendors

1099 users, contractors or subcontractors that will be entering timesheet or expense entries can be entered as Vendors in Minute7.

To add a new vendor in Minute7, follow these steps below:

1. Click the **Sign In** button on <https://minute7.com>
2. Navigate to to the Settings/**Resource Settings** tab
3. Click the **Vendors** tab
4. Click the link **Create New Vendor** and enter the following information
 - a. First Name
 - b. Last Name
 - c. Middle Initial
 - d. Email (must be unique)
5. **Add as a user** checkbox - selecting this box will automatically create a user account for this vendor.
6. **Allow time tracking** checkbox - selecting this box will allow vendors to add timesheet entries.
7. **Permission Settings** - default permissions will allow a user to add and edit their timesheet entries
8. Click the **Save** button to complete the process of adding a new vendor.

Create New Vendor

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Middle Name	Email *
<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> Add as a user ⓘ	
<input type="checkbox"/> Allow time tracking	
Permission Settings ⓘ	
<input checked="" type="radio"/> Default	
<input type="radio"/> Customized	
<div>Save</div> <div>Cancel</div>	

Minute7[®] Setup Guide

Users

Minute7 offers user accounts that can be accessed by creating a username (email address) and password. These accounts can be created for different types of users, including Employees, Vendors, Account Administrators, and Group Managers. When creating Employees or Vendors within Minute7, user accounts are automatically generated.

To add a new user in Minute7, follow these steps below

1. Click the **Sign In** button on <https://minute7.com/>
2. Navigate to the Settings/**Account Settings** tab
3. Click the link **Add a User** and enter the following information
 - a. Email
 - b. First Name
 - c. Middle Name
 - d. Last Name
 - e. Phone
4. Click **Save + Send Invite** button

Edits have been made

Save + Send Invite

Add a New Minute7 User Account

Contact Info

Email

Required

First Name

Required

Middle Name

Last Name

Required

Phone

+1

☐ Also send invitation as Text Message

NOTE: An email address is a unique identifier in Minute7 and can not be duplicated.

Minute7[®] Setup Guide

Adding Data for Time Tracking

Customers

Used to track clients, job codes or projects. The Customer field in Minute7 can be multi-tiered (up to 3 levels). Minute7 users can track time and expense entries against items entered in the Customer field. This field is not required for time or expense entries.

To add a new customers in Minute7, follow these steps below

1. Click the **Sign In** button on <https://minute7.com>
2. Navigate to to the Settings/**Resource Settings** tab
3. Click the **Customer** tab
4. Click the link **Create New Customer** and enter the following information
 - a. Company Name (client, job code or project)
 - b. Parent Customer (if applicable)
5. Click the **Save** button to complete the process of adding a customer.

Create New Customer

Company Name *

Parent Customer

No Parent Customer Selec... ▼

Save

Cancel

Minute7© Setup Guide

Payroll Items

Used to identify various types of payroll hours entered by users adding timesheet entries.

The 3 types of Payroll Items are below:

1. **Regular Hours** - examples of regular hours are: Hourly, Salary, Direct Labor, Overhead, etc.
2. **Overtime Hours** - examples of overtime hours are: overtime, double overtime, shift diff, etc.
3. **Leave Hours** - examples of leave hours are: PTO, Vacation, Sick, Holiday, Jury Duty, etc.

To add a new Payroll Items in Minute7, follow these steps below

1. Click the Sign In button on <https://minute7.com>
2. Navigate to to the Settings/Resource Settings tab
3. Click the Payroll Items tab
4. Click the link Create New Payroll Item and enter the following information
 - a. Name (of Payroll Item)
 - b. Payroll Item Type (from drop down list)
 - c. Click **Save**

Create New Payroll Item

Name *

Pay Type *

No Pay type Selected ▼

Save

Cancel

Minute7[®] Setup Guide

Items (Service)

Service Items are for tracking services a business provides to customers. Service items are part of the timesheet functionality within Minute7.

To add a new Items in Minute7, follow these steps below

1. Click the Sign In button on <https://minute7.com>
2. Navigate to to the Settings/Resource Settings tab
3. Click the **Items** tab
4. Click the link **Create New Item** and enter the following information
 - a. Name (of Item)
 - b. Type (Service or Inventory)
 - c. Click **Save**

Create New Item

<p>Name *</p> <input type="text" value="Project Manager"/>	<p>Item Type *</p> <div>Service ▼</div>
<div>Save</div>	<div>Cancel</div>

Minute7[®] Setup Guide

Adding Data for Expense Tracking

Vendors/Merchants

Merchants or Retailers that should be accounted for when employees or contractors are entering expenses in Minute7.

To add a new vendor in Minute7, follow these steps below:

1. Click the **Sign In** button on <https://minute7.com>
2. Navigate to to the Settings/**Resource Settings** tab
3. Click the **Vendors** tab
4. Click the link **Create New Vendor** and enter the following information
 - a. Last Name/Merchant Name
5. **Add as a user** checkbox - this box should not be checked for adding vendor merchants to Minute7.
6. Click the **Save** button to complete the process of adding a new vendor/mechant.


Create New Vendor

First Name

Last Name/Merchant Name *

Middle Name

Email

☐ Add as a user 

Save

Cancel

Minute7© Setup Guide

Items (Inventory)

Inventory Items are products a business sells and wants to track the quantity of. Typically, a business creates or buys these items, holds them “in stock,” and then sells them to customers. Inventory items are part of the expense functionality within Minute7.

To add a new Inventory Items in Minute7, follow these steps below

1. Click the Sign In button on <https://minute7.com>
2. Navigate to to the Settings/Resource Settings tab
3. Click the **Items** tab
4. Click the link **Create New Item** and enter the following information
 - a. Name (of Item)
 - b. Type (Service or Inventory)
5. Click **Save**

Create New Item

<p>Name *</p> <input type="text" value="Widgets"/>	<p>Item Type *</p> <div>Inventory ▼</div>
<div>Save</div>	<div>Cancel</div>

Minute7[©] Setup Guide

Accounts

Categories used for tracking expenses **only**. Expense accounts are used to categorize your company's transactions. Account categories are day-to-day costs for business operations, like advertising and promotion, office supplies, and rent.

General Accounts

General accounts help you break down your expenses into “categories” so it’s easier to manage your company related expenses. General Accounts can be identified as the following Account Types:

- Assets
- Expenses
- Income
- Liabilities

To add a new General Account in Minute7, follow these steps below

1. Click the Sign In button on <https://minute7.com>
2. Navigate to to the Settings/Resource Settings tab
3. Click the **Accounts** tab
4. Click the link **Create New Accounts** and select the General Accounts radio button
5. Click **Next**
 - a. **Enter the Account Name**
 - b. **Select from the drop down** (Assets, Expenses, Income, Liabilities)
6. Click **Save**

Create New Account

Account Name *

Account Type *

No Account type Select...

Save

Cancel

Minute7© Setup Guide

Payment Accounts

Payment accounts allow you to record expenses tied to credit cards, bank accounts or digital wallets.

To add a new General Account in Minute7, follow these steps below

1. Click the Sign In button on <https://minute7.com>
2. Navigate to to the Settings/Resource Settings tab
3. Click the **Accounts** tab
4. Click the link **Create New Accounts** and select the Payment Accounts radio button
5. Click **Next**
 - a. **Enter the Account Name**
 - b. **Select from the drop down** (Credit Card or Bank)
6. Click **Save**

Create New Account

Payment Account Name *

Payment Account Type *

No Account type Select... ▼

Save

Cancel

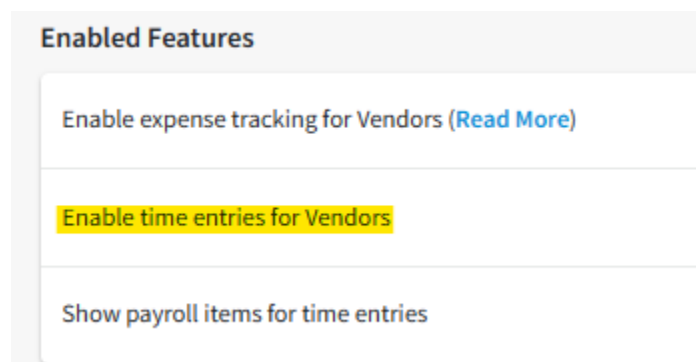
Minute7© Setup Guide

Enabling Features

Turn On Time Entry for Vendors

As an administrator, you can turn on the feature that allows 1099 users, contractors and subcontractors to complete timesheet entries. To turn this feature on, follow these steps:

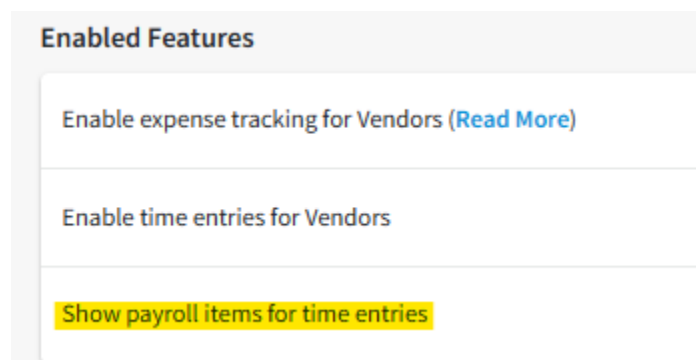
1. Click the Sign In button on <https://minute7.com>
2. Navigate to to the Settings/**Company Settings** tab
3. Locate the **Enabled Features** Heading and toggle the setting **Time Entry for Vendors** to **Yes**



Turn on Payroll Items for Time Entries

As an administrator, you can customize what payroll items are accessible to each user while completing a timesheet. The software can be set to have a default payroll item be automatically selected (does not appear on the timesheet) or provide the user with a list of payroll items to select from while completing the timesheet entry. To turn this feature on, follow these steps:

1. Click the Sign In button on <https://minute7.com>
2. Navigate to to the Settings/**Company Settings** tab
3. Locate the **Enabled Features** Heading and toggle this setting to **Yes**



Minute7© Setup Guide

Setting Up Permissions

Minute7 provides multiple levels of access, allowing its users to fine-tune who can view what is within your organization. Setting permissions allows you to control access to the organization, user, and customized groups.

By default, a new Minute7 user account can only enter, view and edit his/her own time and expense data. By editing user permissions, you have the option to grant both new and existing users access to manage their accounts, other employees' time/expense, and also some of the administration tasks.

1. To grant permission to a user, log in from the manager's account. Go to Settings>Account Settings
2. Navigate to the user you want to grant permissions to, and click on the shield icon next to the user name.

Account Permissions

Account permissions is where the Minute7 account Administrator can set or define specific permission and access to various aspects and/or features for each Minute7 user.

Account Permissions	
Manage Users	Create and edit other users, perform all actions except edit account details/billing information
Create and View Time and Expense Reports	Create and view reports showing time and expense entries for users who this user can view time entries for
Clock In/Out Only	Enter time entries using timer only, not entering in duration. Also this user won't be able to edit/duplicate entries.
Edit Payroll	Allow this user to assign payroll items to time entries

Minute7[©] Setup Guide

Time Permissions

Time tracking permissions can be set for viewing, editing, and approving timesheets.

Time Permissions

View time entries for

Edit time entries for

Approve time entries for

Expense Permissions

Expense tracking permissions can be set for viewing, editing, and approving expenses.

Expense Permissions

View expense entries for

Edit expense entries for

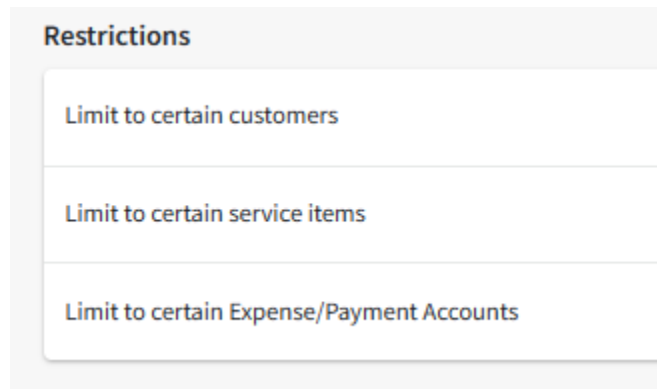
Approve expense entries for

Minute7[®] Setup Guide

User Restrictions

Restrictions are used to display a refined list of customers, service items, expense/payment accounts, and classes to the user when entering time entries or expense entries.

1. To grant permission to a user, log in from the manager's account. Go to Settings>Account Settings
2. Navigate to the user you want to set restrictions for, and click on the shield icon next to the user name.



The screenshot shows a 'Restrictions' panel with three toggleable options:

- Limit to certain customers
- Limit to certain service items
- Limit to certain Expense/Payment Accounts

Minute7[®] Setup Guide

Permission Groups

By creating a permission group in Minute7, a user can easily provide permission to all other employees who fall under the same category rather than having to change each employee's preferences individually. This is especially beneficial to businesses with several hierarchy systems for employee authority and various work quotas.

Additionally, even within a permission group, an administrator can override a user's permissions in preference of more customized settings. This feature is introduced so that within an organization, one employee(supervisor) may oversee each group and have access to its time and expense reporting.

1. Go to Settings>Account settings.
2. Navigate to Permission groups and click on “Add a Permission Group”

Add Permissions Group

[Back to Account Settings](#)

Group Name

Name

Account Permissions

Manage Users

Create and edit other users, perform all actions except edit account details/billing information

☐ Yes

☒ No

Create and View Time and Expense Reports

Create and view reports showing time and expense entries for users who this user can view time entries for

☐ Yes

☒ No

Edit Payroll

Allow this user to assign payroll items to time entries

☐ Yes

☒ No

Time Permissions

View time entries for

☒ Only him or herself

☐ All employees

☐ Certain employees

Edit time entries for

☒ Only him or herself

☐ All employees

☐ Certain employees

Approve time entries for

☒ No one

☐ Only him or herself

☐ All employees

☐ Certain employees

Expense Permissions

View expense entries for

☒ Only him or herself

☐ All Vendors

☐ Certain Vendors

Edit expense entries for

☒ Only him or herself

☐ All Vendors

☐ Certain Vendors

Approve expense entries for

☒ No one

☐ Only him or herself

☐ All Vendors

☐ Certain Vendors