Minute7© Setup Guide

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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.

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.

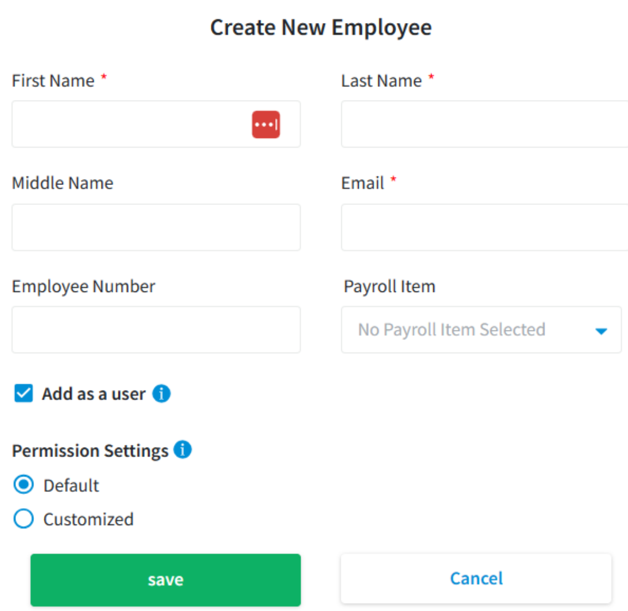
Adding Employee, Vendor and Users to Minute7

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.



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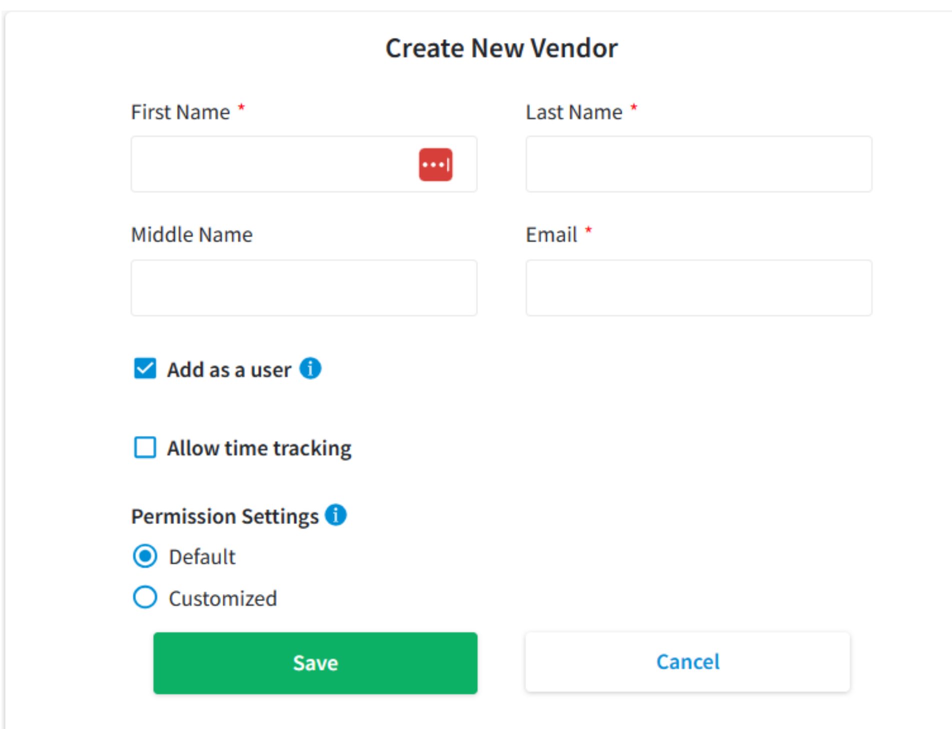
Vendors

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.

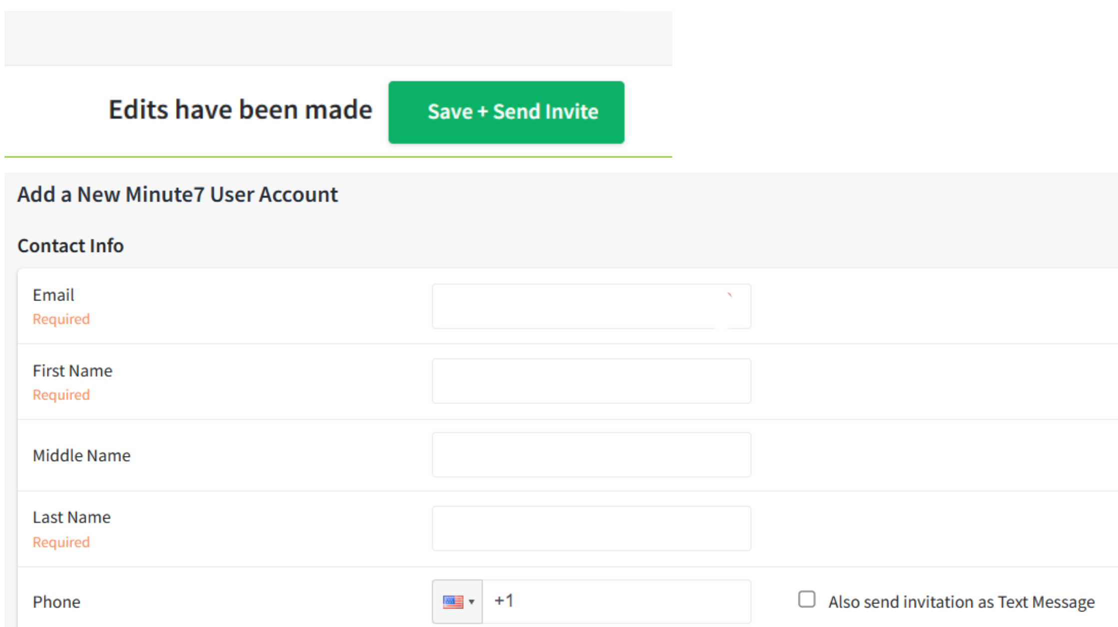


Users

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 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



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

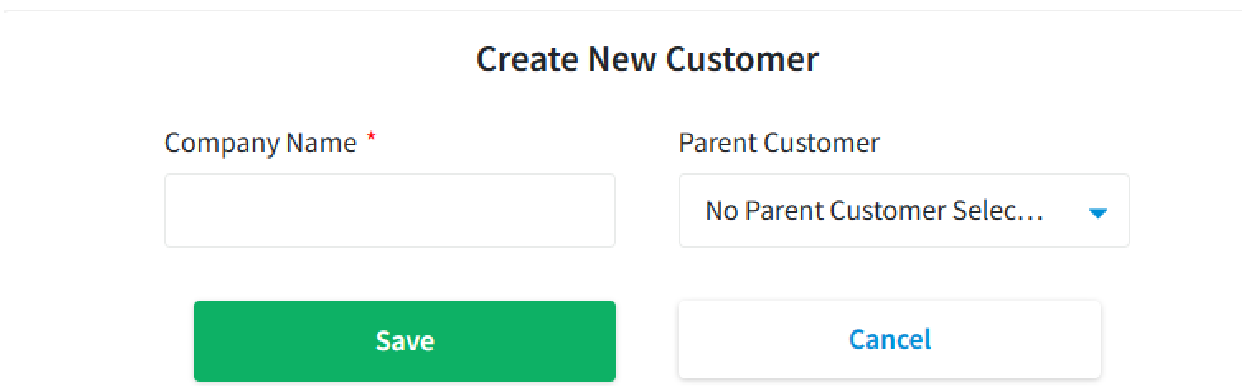
Adding Data for Time Tracking

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.



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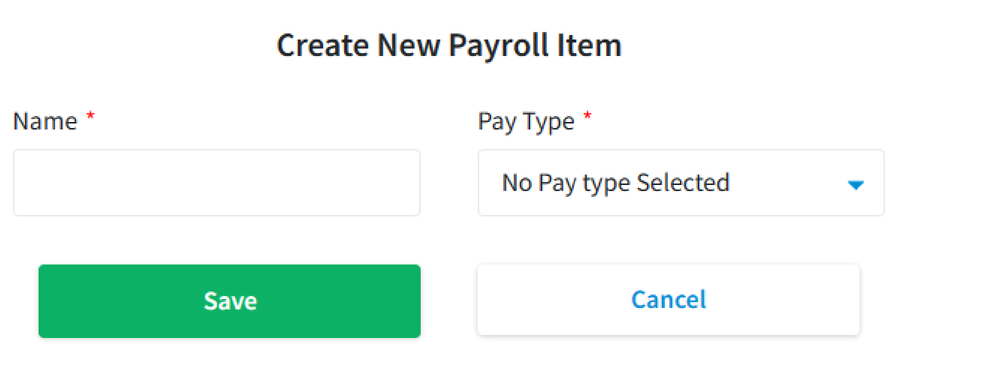
Payroll Items

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**

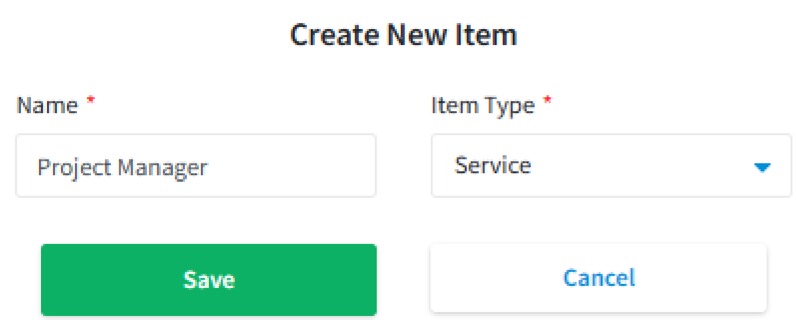


Items (Service)

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**



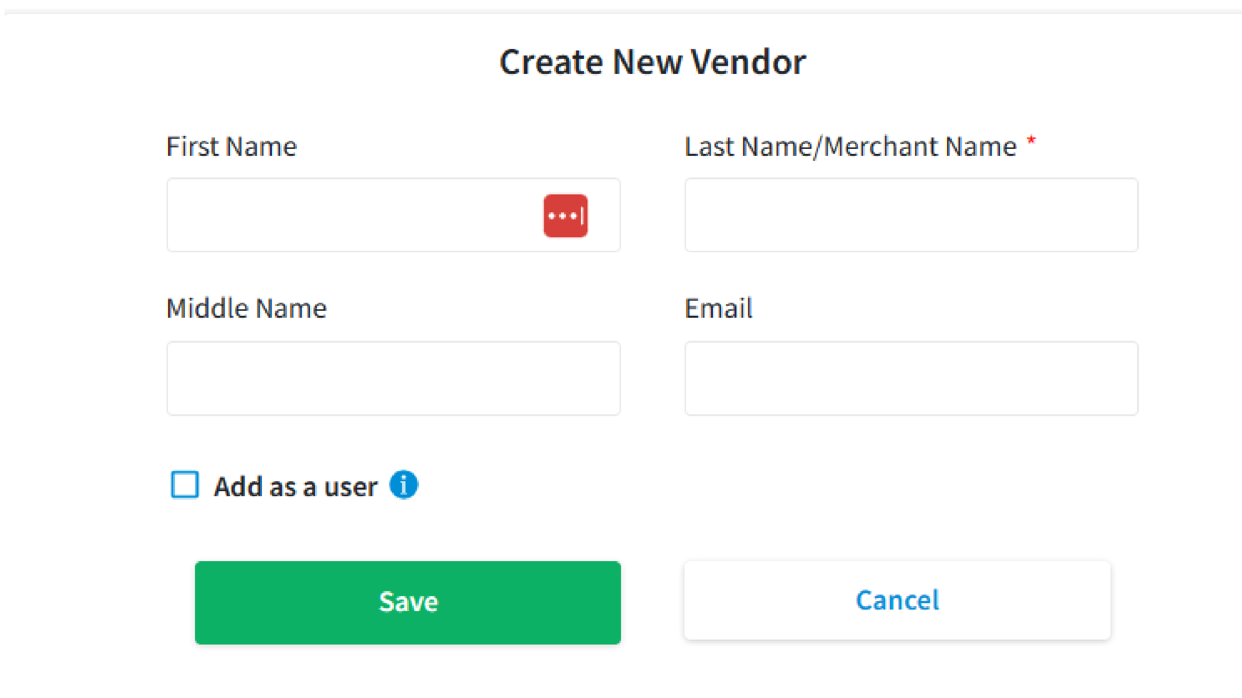
Adding Data for Expense Tracking

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.

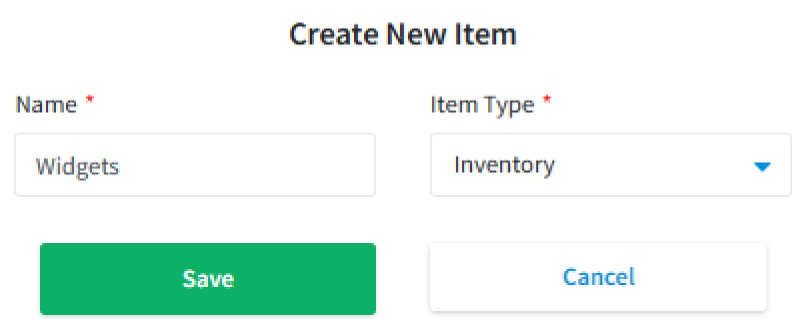


Items (Inventory)

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**



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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.

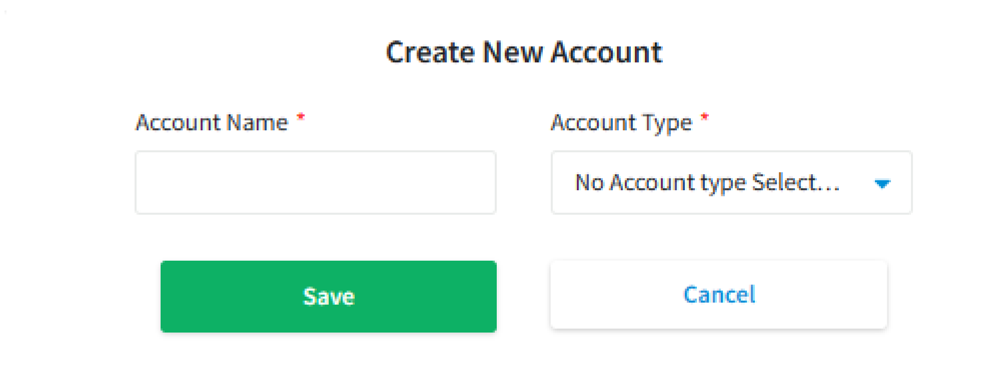
General Accounts

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

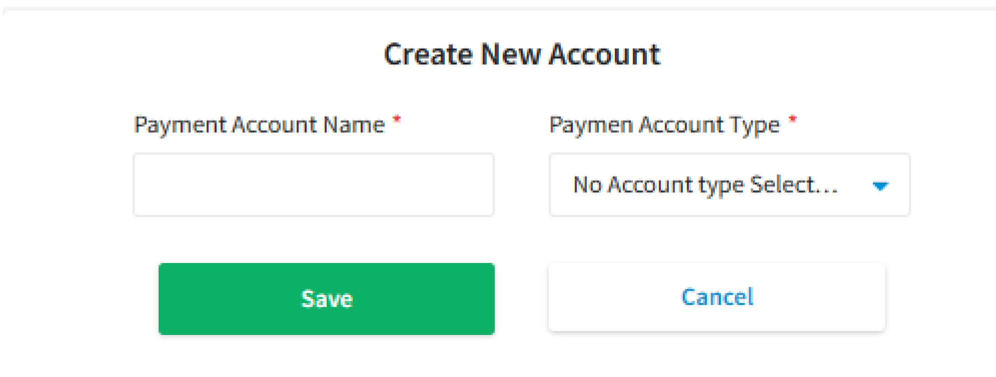
1. Click the Sign In button on https://minute7.com
2. Navigate to to the Settings/Resource Settings tab
3. Click the **Accounts** tab
4. Click the link **Create New Accounts** and select the General Accounts radio button
5. Click **Next**
    a. **Enter the Account Name**
    b. **Select from the drop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



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**

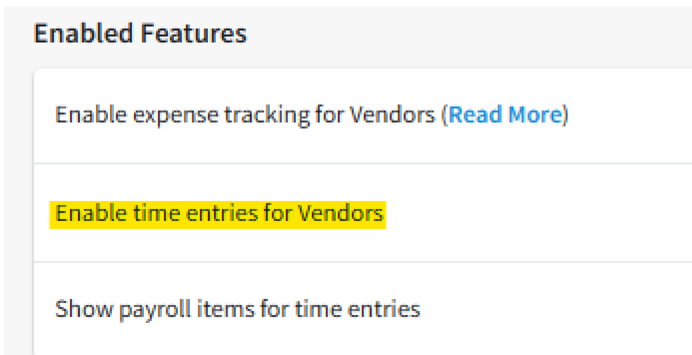


Enabling Features

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:

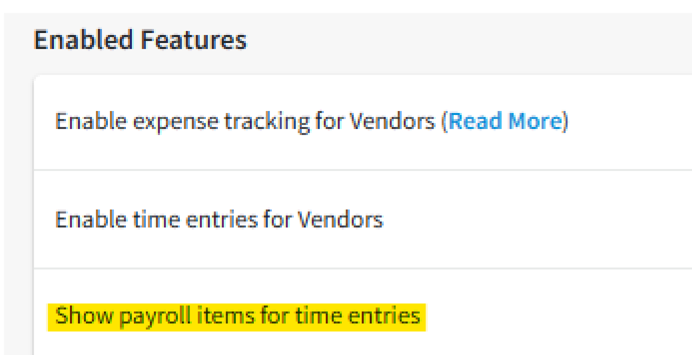
1. Click the Sign In button on https://minute7.com
2. Navigate to to the Settings/**Company Settings** tab
3. Locate the **Enabled Features** Heading and toggle the setting **Time Entry for Vendors** to **Yes**



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**



Setting Up Permissions

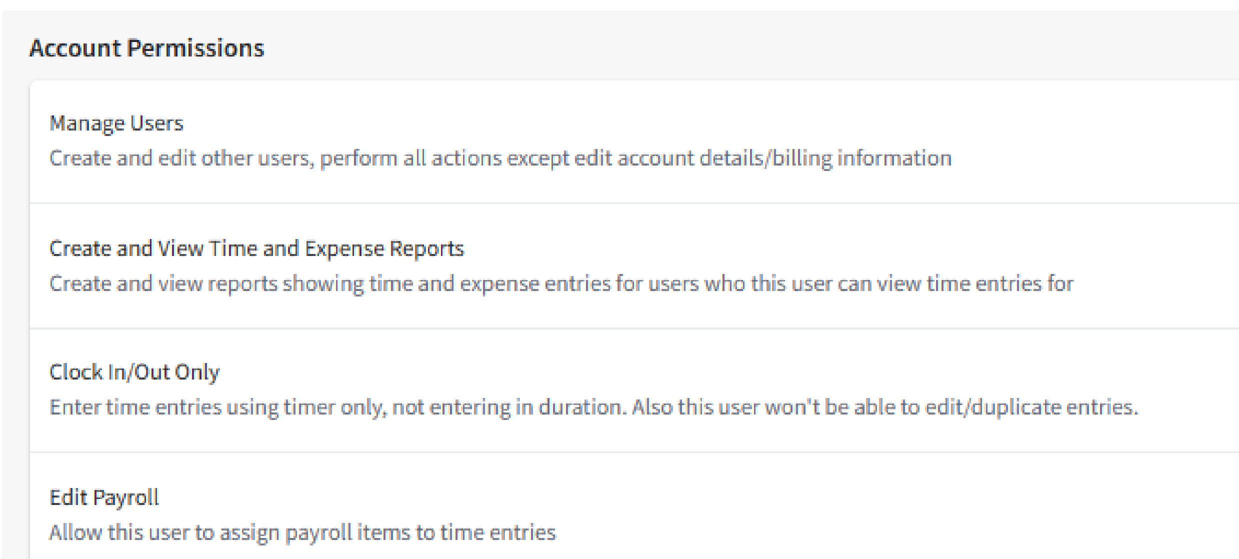
Minute7 provides multiple levels of access, allowing its users to fine-tune who can view what is within your organization. Setting permissions allows you to control access to the organization, user, and customized groups.

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.

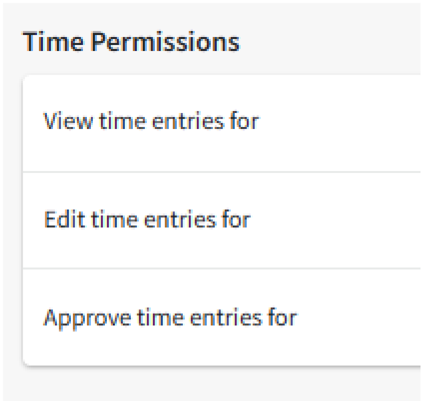
Account Permissions

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.



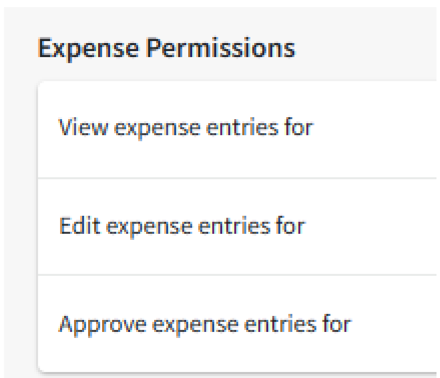
Time Permissions

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



Expense Permissions

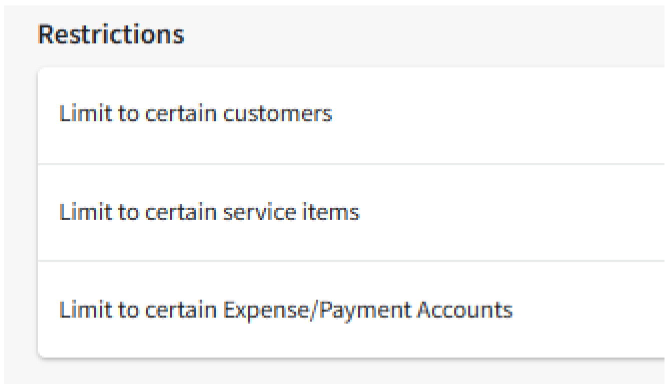
Expense tracking permissions can be set for viewing, editing, and approving expenses.



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.



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”