Tempora Quick Guide – Adding a New Client

Please note that this Quick Guide offers general guidance, and that the precise instructions for adding a new client will vary between each organisation. In this Quick Guide, we have assumed that:

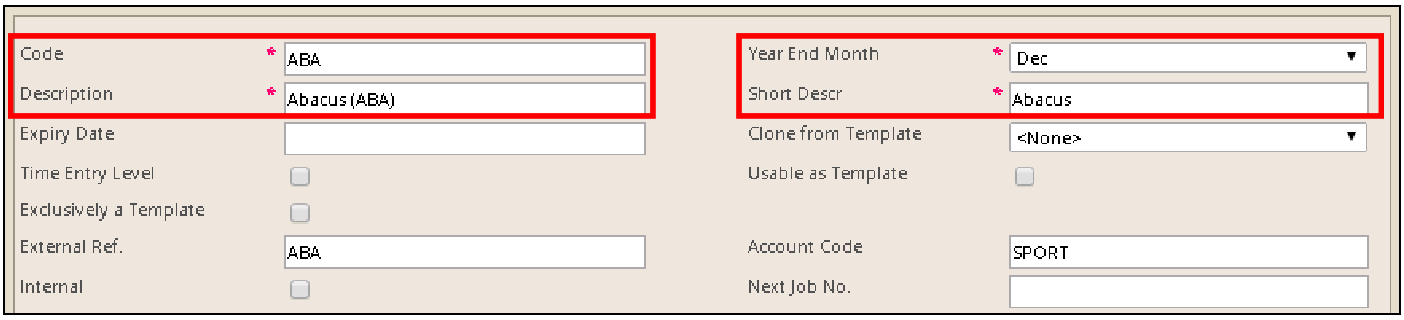
- Your organisation uses a standard 3-level Client/Project/Activity structure.
- Each client has its own set of activities used by all of its projects.

Step 1 – Create the New Client

- Click on the **Admin** tab.

- On the left hand side, select **Clients > Add New**.

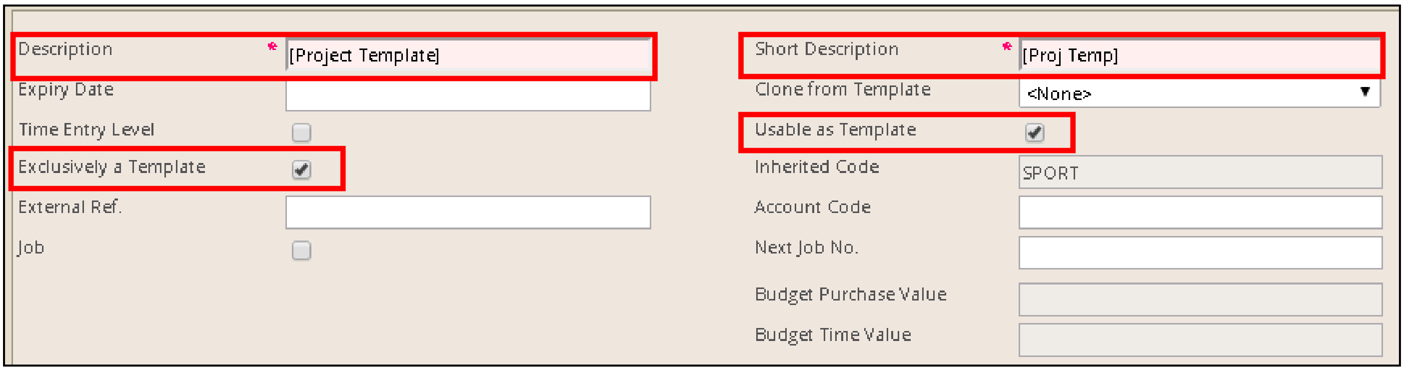
- Enter a **unique three letter Code** to identify the Client by, e.g. ABA.
- Enter the name of the new client in the **Description** and **Short Descr** fields, e.g. Abacus Ltd.
- Specify the client's **Year End Month**, if known.
- Click **Save**.



Step 2 – Create the Project Template

- On the left hand side, select **Clients > Name of the new client > Project > Add New.**

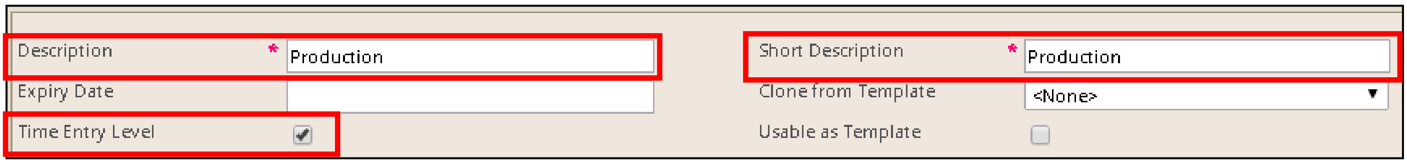
- In the **Description** and **Short Description** field, enter **[Project Template].**
- Tick the **Usable as Template** and **Exclusively a Template** checkboxes.
- Click **Save**.



Step 3 – Add Activities to the Project Template

- On the left hand side, select **Project > [Project Template] > Activity > Add New**.

- Enter the name of the activity in the **Description** and **Short Description** fields.
- Tick the **Time Entry Level** checkbox.
- Click **Save.**
- **Repeat Step 3** for as many activities as required.



Step 4 - Add Projects to the Client

- On the left hand side, select **Project > Add New.**

- In the **Description** and **Short Description** field, enter the name of the project.
- In the **Clone from Template** field, select **[Project Template]**. Please note that it will not be possible to link the new project to the template at a later stage, so it is important to remember to select the template at this point.
- Click **Save**.
- **Repeat Step 4** for as many projects as required.