

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:

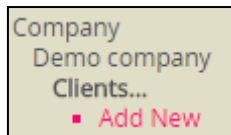
- Your organisation uses a standard 3-level Client/Project/Activity structure.
- Each client has its own set of activities used by all of its projects.

Step 1 – Create the New Client

- Click on the **Admin** tab.



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

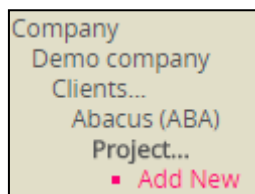


- Enter a **unique three letter Code** to identify the Client by, e.g. ABA.
- Enter the name of the new client in the **Description** and **Short Descr** fields, e.g. Abacus Ltd.
- Specify the client's **Year End Month**, if known.
- Click **Save**.

Code	* ABA	Year End Month	* Dec
Description	* Abacus (ABA)	Short Descr	* Abacus
Expiry Date		Clone from Template	<None>
Time Entry Level	<input type="checkbox"/>	Usable as Template	<input type="checkbox"/>
Exclusively a Template	<input type="checkbox"/>	Account Code	SPORT
External Ref.	ABA	Next Job No.	
Internal	<input type="checkbox"/>		

Step 2 – Create the Project Template

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

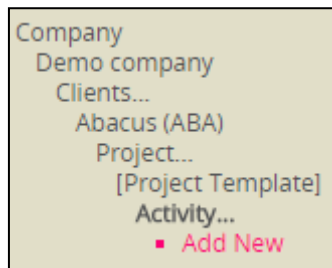


- In the **Description** and **Short Description** field, enter **[Project Template]**.
- Tick the **Usable as Template** and **Exclusively a Template** checkboxes.
- Click **Save**.

Description *	[Project Template]	Short Description *	[Proj Temp]
Expiry Date		Clone from Template	<None>
Time Entry Level	<input type="checkbox"/>	Usable as Template	<input checked="" type="checkbox"/>
Exclusively a Template	<input checked="" type="checkbox"/>	Inherited Code	SPORT
External Ref.		Account Code	
Job	<input type="checkbox"/>	Next Job No.	
		Budget Purchase Value	
		Budget Time Value	

Step 3 – Add Activities to the Project Template

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

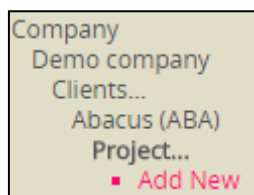


- Enter the name of the activity in the **Description** and **Short Description** fields.
- Tick the **Time Entry Level** checkbox.
- Click **Save**.
- Repeat Step 3** for as many activities as required.

Description *	Production	Short Description *	Production
Expiry Date		Clone from Template	<None>
Time Entry Level	<input checked="" type="checkbox"/>	Usable as Template	<input type="checkbox"/>

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.

Description *	My Project	Short Description *	My Project
Expiry Date		Clone from Template	Project template
Time Entry Level	<input type="checkbox"/>	Usable as Template	<input type="checkbox"/>