

TeamBOX



TEAMBOX.Hilfe

Table of Contents

Welcome	4
First Steps	5
ADRESSES	6
How do I look up a contact?	7
How do I create a new contact?	8
How do I edit contact details?	9
JOBS	10
How do I find or select a job?	11
How do I create a job?	12
ACTIVITIES	14
How do I plan an activity?	15
TIME TRACKING	17
How can I create a work time record?	18
FINANCES	19
How do I create a new offer?	20
How do I create a new incoming invoice?	22
How do I create a new outgoing invoice?	23
EMPLOYEES	25
How do I record/change absences?	26
Use Cases	27
GENERAL	28
Where do I find TEAMBOX modules and their core features?	29
How do I navigate around TEAMBOX modules?	30
What are the basic navigational/operational elements throughout TEAMBOX?	31
How can I customize my TEAMBOX cockpit/start page?	32
What other information can I access from the main navigation bar?	33
How do I upload files to TEAMBOX?	34
MESSAGES	35
What can I do with messages?	36
What kinds of messages are there?	37
How can I customize my “Messages”?	38
CALENDAR	41
How can I create a new appointment?	42
How can I invite participants?	44
How can I work with public holidays?	45
How can I sync/subscribe to calendars?	47
How can I subscribe to a calendar using iCal?	49
How can I subscribe to a calendar using Outlook?	51

How can I subscribe to a calendar using Google Calendar?	52
How can I sync a calendar with an Android phone?	54
How can I sync a calendar with an iPhone?	58
How can I sync a calendar using iCal?	59
ADDRESSES	60
How do I work with “Extended search”?	61
How can I export addresses as a .csv file?	63
How can I generate address labels?	64
How do I add a new company?	66
How do I add a new employee?	68
How can I activate ‘work entry control’?	69
How can I generate a password for a user?	70
Where can I define off days for a user?	73
How do I create (and use) blog entries?	75
How can I create or edit tags?	76
How can I assign/remove a tag to/from a contact?	78
How can I transfer address data?	79
How can I request address data via LDAP?	80
How can I transfer address data via CardDAV?	82
JOBES	83
How do I find or select a job?	84
How do I create a new area?	86
How do I create a job?	87
How can I display what kind of information in the job overview?	88
How can I change pricing on different levels (client, area, job)?	91
How can I create a job report?	92
Where can I get a graphical overview of active jobs?	93
Finance cloud	95
Activity cloud	96
How can I migrate data from one job to another?	97
ACTIVITIES	99
How do I plan an activity?	100
How can I create new phases?	101
How can I copy work packages or move their deadlines?	102
How can I view/filter activities?	105
How do I use the Gantt chart?	107
How can I export activities/gantt data as Excel/PDF file?	109
What information can I see in “Resource Plan”?	110
How do I track time for an activity from within the activity list?	112
TIME TRACKING	113
How can I track my work hours?	114
How can I finish my day using time tracking?	116

How can I move time tracking entries?	117
How can I evaluate time tracking entries?	118
FINANCES	119
Estimates	120
How can I search estimates?	121
How do I create a new offer?	122
How can I create a copy of an estimate?	123
How can I confirm an estimate?	125
How do I create a template for estimates?	126
How do collective estimates work?	127
Incoming invoice	128
How can I look for an incoming invoice?	129
How do I create a new incoming invoice?	130
How can I create an OOP Invoice?	131
How can I create a third-party invoice?	133
How can I change the status of an incoming invoice to “paid”?	135
How can I bill an OOP manually?	136
Outgoing invoice	137
How can I look for an outgoing invoice?	138
How do I create a new outgoing invoice?	139
How can I create an advance invoice?	140
How can I cancel an invoice?	142
How can I create a collective invoice?	144
Collective invoice as PDF	146
How can I approve an outgoing invoice?	147
How can I manually bill an outgoing invoice?	148
Recurring invoice	149
How can I generate recurring invoices?	150
Billing list	152
How can I visualise open services in the billing list?	153
How can I create invoices from the billing list?	154
Controlling	155
How does “Controlling” work?	156
Forecast	157
How can I create forecasts?	158
Which insights can I gain from forecasts?	160
Settings	161
How can I define general financial settings?	162
What kind of billing types are there?	163
PRODUCTION	165
How can I create a new production request?	166
How can I work with offers following a production request?	167

How can I accept an offer and create a production order from it?	168
Where can I look for existing production documents?	170
DOCUMENTS	171
How can I create a new document?	172
Where can I look for existing documents?	174
ADMIN	176
Where can I define roles, departments and functions?	177
Which settings can be defined / customized for activities?	179
Where can I define / customize calendar categories and resources?	181
Where can I define the industry sectors for my contacts?	183
How can I define the job status and the start of the budget year?	184
Where can I define cost types?	186
Where can I define services?	187
Where can I define rates?	188
How can I combine new cost types, services and rates?	189
How can I assign permissions to roles?	190
Where can I change notification settings for “Messages”?	192
MAILBOX	194
How are emails displayed in TEAMBOX?	195
How can I look for emails?	198
What features does “Mailbox” offer?	199

Welcome

TEAMBOX.Help is structured in the following areas:

- [First Steps](#)
 - Here is a brief overview of the most important first steps involved in using the TEAMBOX
- [Use Cases](#)
 - Various use cases are answered based on possible questions

The keyword search can also be used to search for help topics.

Our goal is to always show the latest TEAMBOX.Version in the online help, but please understand that this is not always possible. If you have any questions, please send an e-mail to support@intevo.net.

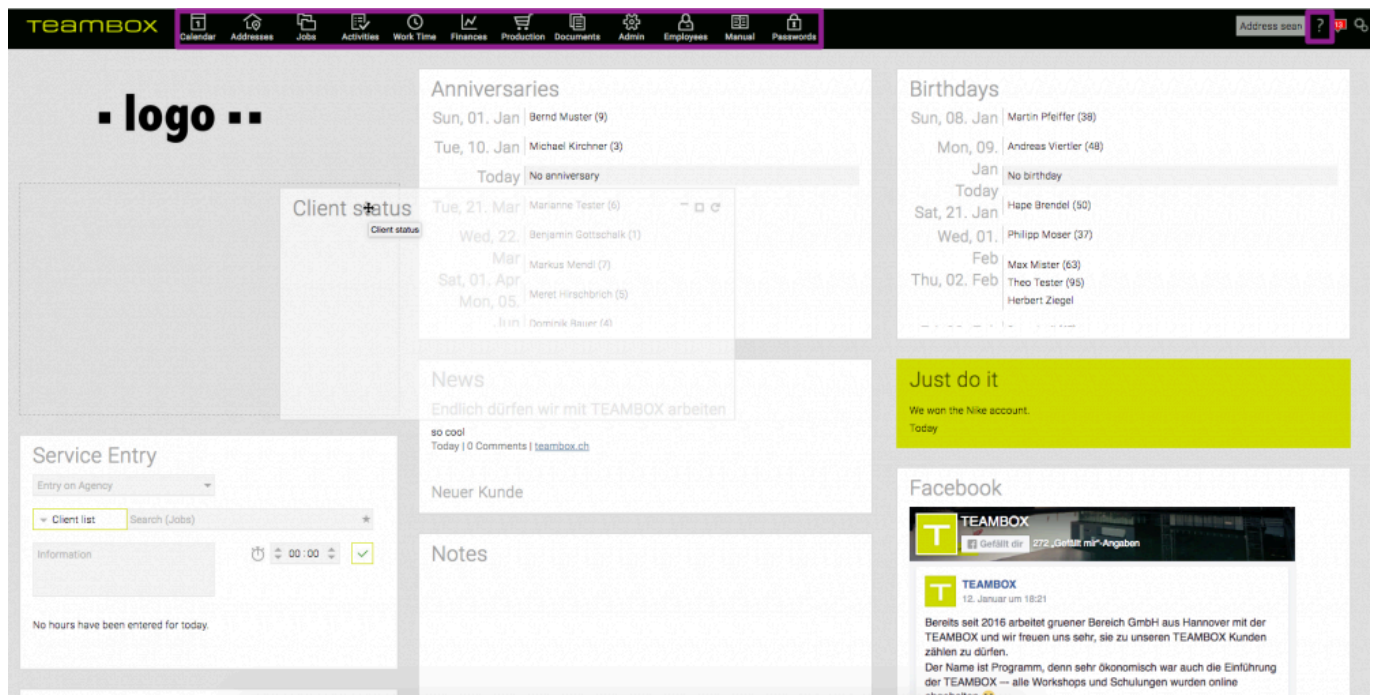
Enjoy the work with the TEAMBOX!

P.S.: The online help describes ALL modules and features available in the TEAMBOX. The functions that are actually available to you in your TEAMBOX depend on your permissions, the purchased/rented modules or, as described above, on the TEAMBOX.Version.

First Steps

How do I find my way around TEAMBOX?

- TEAMBOX Cockpit is the main page and any of the displayed widgets can be freely arranged via drag & drop
- Navigate to other modules using the black menu bar at the upper edge of the screen
- The online help can be accessed by clicking the question mark on the right edge of the menu bar



ADRESSES

- [How do I look up a contact?](#)
- [How do I create a new contact?](#)
- [How do I edit contact details?](#)

How do I look up a contact?

Either by

- simply entering the person's or company's name in the search bar in the upper-right corner
- Using the module "Addresses" > "Quick Search": select the client from the drop-down or enter a keyword

Quick Search Advanced search Add Person Add Company

Client
»select«

Saved Search Queries
»select« [Edit](#)

Search Term

Search


How do I create a new contact?





- Using the menu bar, navigate to “Addresses” > “Add Company”
- Enter the relevant company details (name, contact) and click “New”
- Select a role from the dropdown “Status”, such as “Client”
- Enter the client’s “Code / Number” in the extra field that is now displayed (max. 15 characters, no special characters or umlauts)
- If relevant, add more information and confirm your input by clicking “Save”

The screenshot shows the TeamBOX interface with the 'Addresses' menu open. The 'Add Company' option is selected. The form contains the following fields:

- Company name**: A text input field with the placeholder text "(Leave empty if not available)".
- Contact Person or freelancer**: A section containing two text input fields for "Name" and "Surname".
- Buttons**: At the bottom, there are three buttons: "New" (highlighted with a red box), "Search", and "Cancel".

How do I edit contact details?

- By clicking the  icon (OR via drag & drop) you can upload a logo or picture for that contact
- Clicking “Edit” in any section enables you to add and save more information for that section in a new page (such as addresses or telephone numbers)
- In the client details there is also a section called “People” – next to it, you’ll find a link called “New” and by clicking it, you can add another person to the company (other than your own company)
- Use “Stickers” to add labels or categories to a contact (such as “Christmas”, “newsletter”, etc.)
- The “Change log” keeps track of any changes made
- Use the “Blog” to record individual notes such as important phone conversations, meetings, etc.

<p>Client Edit</p>  <p>Josef Manner & Comp AG</p> <p>6 Manner http://www.manner.at</p> <p>Contact information Edit</p> <p>Company address Hernalser Hauptstraße 32 A - 1170 Wien</p> <p>Billing address rechnungsadressestrassefirmenbez Rechnungsadressestrasse 1060 Wien</p> <p>other address sonstige firmenbez sonstige adresse strasse A - 1060 wien</p> <p>Tel. Company +43 1 586 49 49</p> <p>Fax Company +43 1 586 49 50</p> <p>E-mail addresses office@manner.at</p> <p>Bank Account Edit</p>	<p>People New</p> <p>Fuchs Edward Müller Markus Abteilungsleiter Süss Katrin</p> <p>Partner Firms New</p> <p>Textissimo AG [Lektoren]</p>	<p>Sticker</p> <p>Category</p> <p>»select«</p> <p>»Add Sticker«</p> <p>Newsletter</p> <p> Mitarbeiter Newslett...</p> <p>Weihnachtskarte</p> <p> Xmas 2014</p> <p>Einladungen</p> <p> Herbstfest</p>	<p>Change log Details</p> <p>jv, 20/09/2016: Sticker gesetzt: Mitarbeiter Newsletter</p> <p>jv, 20/09/2016: Sticker entfernt: Neuer Sticker</p> <p>Blog Details</p> <p>mare, 12/10/2016: Telefon xxxxxxx</p>
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JOBS

- [How do I find or select a job?](#)
- [How do I create a job?](#)

How do I find or select a job?

- Go to the “Jobs” module and use “Job Management”, “Job Report” or “Job Portfolio”

HINT: in “Job Management”, there are different ways of selecting a job from your list of clients:

- Click the client’s name, select the tab “Jobs” > “Area” and then the relevant job using your mouse or keyboard
- Alternatively, start entering the name of the job in the green search bar and select the relevant result from the live results

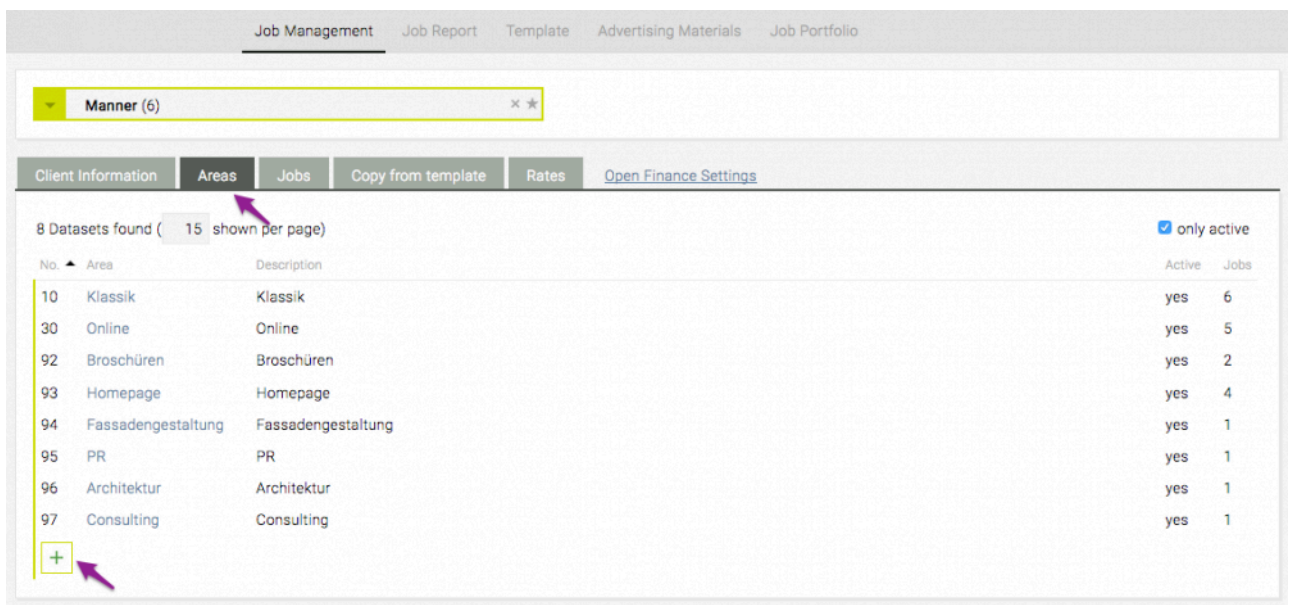
The screenshot shows the 'Job Management' tab selected in the top navigation bar. Below the navigation bar, there is a search bar with a dropdown menu labeled 'Client list' and a search input field containing 'webs'. A search result is displayed below the input field: '006.101601 | Website Redesign < Klassik < Manner'. Below the search bar, it indicates '21 Datasets found (15 shown per page)'. The first dataset is highlighted with a yellow background: '1..15 | 16..21'. Below this, a table lists the datasets.

No.	Code ▲	Name	active	Areas	Jobs
205	54	Evus Immobilien AG	yes	1	3
193	absm	AbsoluMayer AG	yes	2	2
59	Adidas	Adidas	yes	7	3
203	Apple	Apple	yes	6	12
54	BMW_UK	BMW (UK) Ltd.	yes	6	4
214	Caritas	Caritas Schweiz	yes	1	1

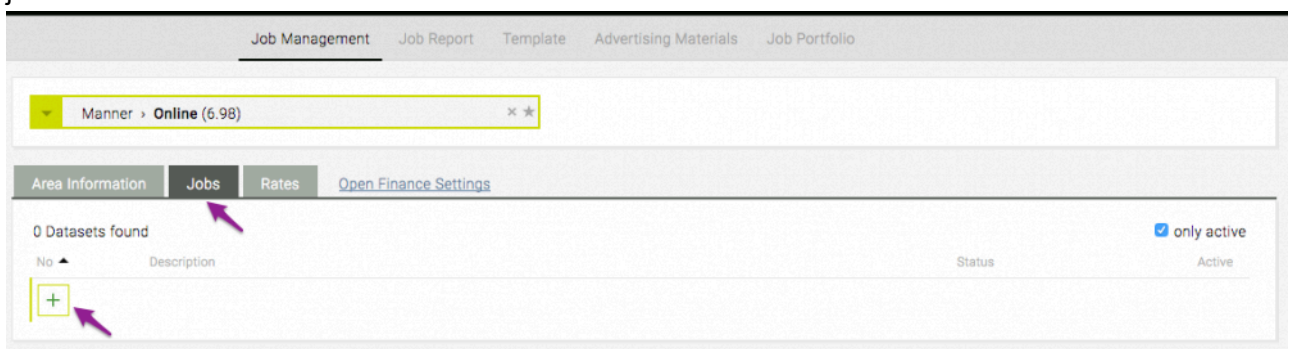
How do I create a job?

Jobs are created using the module “Jobs” > “Job Management”, provided that

- a client has already been created (see [How do I create a new contact](#) for more details)
- an area has been created for that client
- Open “Job Management” and select a client from the client list
- Click the tab “Areas” – clicking the green plus icon at the end of the list creates a new area that can be further defined and saved



- Now, still in the area menu, click the tab “Jobs” and click the green plus icon again to create a new job



- Enter the job’s description and, if applicable, you can also set “Status” and “Budget Year”
- Finally, confirm all changes by clicking “Save”

The screenshot displays the 'Job Management' section of the TEAMBOX application. At the top, there is a navigation bar with tabs: 'Job Management' (selected), 'Job Report', 'Template', 'Advertising Materials', and 'Job Portfolio'. Below this, a search bar shows 'Manner > Online (6.98)'. The main content area is titled 'Job overview' and includes tabs for 'Rates' and 'Open Finance Settings'. The 'Job Information' section contains the following fields:

- Number:** »not yet given«
- Budget Year:** 2017
- Status:** Pitch
- Phase:** + (highlighted with a yellow box)
- Description:** (empty text area)
- Active:** yes
- Created:** 16. Jan 2017
- Internal Responsible Person:** Baertschi, Anna (with an 'active' checkbox)
- External Responsible Person:** Fuchs, Edward
- Job Description:** (text area with rich text formatting icons)

At the bottom of the form, there are two buttons: 'Save' (highlighted with a purple box) and 'Back'.

HINT: the tab “Job overview” shows you all the details for one particular job. All relevant data, such as invoices, offers, time entries or documents, is clearly displayed and can be opened straight away.

ACTIVITIES

- [How do I plan an activity?](#)


How do I plan an activity?

Precondition:

- a correctly created job (see [How do I create a job?](#) for more details)
- Open “Activities” > “Activity List” and use the search bar to locate the relevant job
- In the results list, click the green plus icon next to the selected job to create a new activity
- Provide a name for the activity in the “What” field (mandatory)
- Select the responsible person from the “Who” drop-down list and define a time span using the calendar or writing the dates into “From” and “To”
- Optionally, you can also add work package details using the small squares on the right
- Save your changes by hitting ENTER or clicking “Save”
- Optionally, you can add tasks to your activity by clicking the green plus icon in the extra detail section on the right

HINT1: in “Job Management”, there are different ways of selecting a job from your list of clients: Click the client’s name and select the tab “Jobs” > “Area” and then the relevant job using your mouse or keyboard.

Alternatively, start entering the name of the job in the green search bar and select the relevant result from the live results.

HINT2: You can also turn an activity into a milestone: double-click the activity to edit it, click the  icon and hit enter to save this change

Activity List

Gantt Chart

Resource Plan

Job (Client Area)

Manner > Online > Social Media Strategy (006.301601) x *

Phase

Open x

Responsible

Text search

From

To

Job status

Tasks

Job responsibility (internal)

Job responsible person (ex)

Attribute

< > Page 1 of 1 >>

Grouping

Job name

Ascending

Color

Until

What

Who

From

To

planned Hrs.

D

O

S

K

D

A

P

+ Social Media Strategy (006.301601) < Online < Manner

Who

From

To

planner

What

Who

From

To

Further responsible persons.

Service

Rate

planned

Describe the Work package

Manner > Online > Social Media Strategy (006.301601) x *

Phase

Attribute

New

Refresh

Delete

Copy

Move

PDF

Excel

Save

Delete

Cancel

TIME TRACKING

- [How can I create a work time record?](#)

How can I create a work time record?

Preconditions:

- a correctly created job
- fully defined services ("Admin" > "Services Admin" > "Services")
- Select a job
 - Click the client's name and select the tab "Jobs" > "Area" and then the relevant job using your mouse or keyboard
 - Alternatively, start entering the name of the job in the green search bar and select the relevant result from the live results
 - Or click the star icon in the right corner of a job search field (this will list the last 15 jobs with previously recorded timekeeping entries)
- Choose the relevant "Service" and, if applicable, "Rates"
- In the field "Information" you can insert notes and comments which might be a mandatory field depending on your configuration
- Now, you can enter the time invested or adjust it by using the arrow icons on the left/right; alternatively, invested time for a specific job can also be automatically tracked by clicking the stopwatch icon when starting the job and clicking it again once you are finished
- Finally, click the green check icon to committ all changes

Today

☐ No Absences

January 2017

Mo	Tu	We	Th	Fr	Sa	Su
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16						

Today Legend

- Open day
- Closed day
- Holiday
- Selected day
- Today

Service Entry

Entry on Agency

Manner > Online > Social Media Strategy (006.301601) ✕ ★

Service Rates

Information

⌚ 00:00 ✓

Recorded Services

Client	Area	Job number	Job name	Service	Information	Item	hh:mm
Add							

FINANCES

- [How do I create a new offer?](#)
- [How do I create a new incoming invoice?](#)
- [How do I create a new outgoing invoice?](#)

How do I create a new offer?

Preconditions:

- a correctly created job
- Go to “Finances” > “Estimates”
- Choose a job by filtering results by budget year, client, area and job, and click “select”
- For the very first estimate for this job, the general settings will be displayed; you may or may not change them, but you have to click “Save” to continue; otherwise, just click “new Estimate”
- Several fields might be already filled but can still be changed
- Now, you can add all the estimated costs by clicking the green plus at the end of the estimate:
 - Select a “Cost Type”
 - Specify a text for the cost and the cost itself; you can either enter this data directly or use the function “calculate” to automatically calculate the cost for a specified service and time frame (checking “Create position text” will also automatically insert a suitable text for that calculation)
 - Now, click the green check icon at the end of the line to committ all changes
 - You can now add more costs to your offer or rearrange the existing ones by using the other options at the end of the line (+ , x , -, ...)
- Finally, click “Save” at the end of the page to save a first version of the offer
- If you want, you can click “PDF” to check the details of the offer as a PDF file
- Only when you click “Finalize + PDF”, the offer is officially registered in the system – the state changes, a number is generated and a final PDF is created

HINT text blocks: You can use “Cost Type” > “Text” > “Text blocks” for offers and invoices to save time and create a uniform look and feel for your documents – simply click the green puzzle icon. By default, texts for the selected cost type are displayed, but you can browse all available texts. Clicking “New” enables you to create a new text block, so you can add new text blocks at any given point.

Page 21 of 201

How do I create a new incoming invoice?

- Go to “Finances” > “Incoming Invoice”
- Click the button “New” to create a new “Out of Pocket” invoice or “Third Party Invoice” (choose the relevant option from the field “Invoice Type”)
- Specify the “Supplier” and enter the “Invoice Number”
- Define the exact costs by clicking the green plus icon beneath “Cost Type”
- Optionally, you can add the original file to the invoice by clicking the green plus icon next to “Original Document” or simply by dragging and dropping a file in that area
- Complete the invoice by clicking “Save”

The following options are available to you:



‘check’: confirming your changes

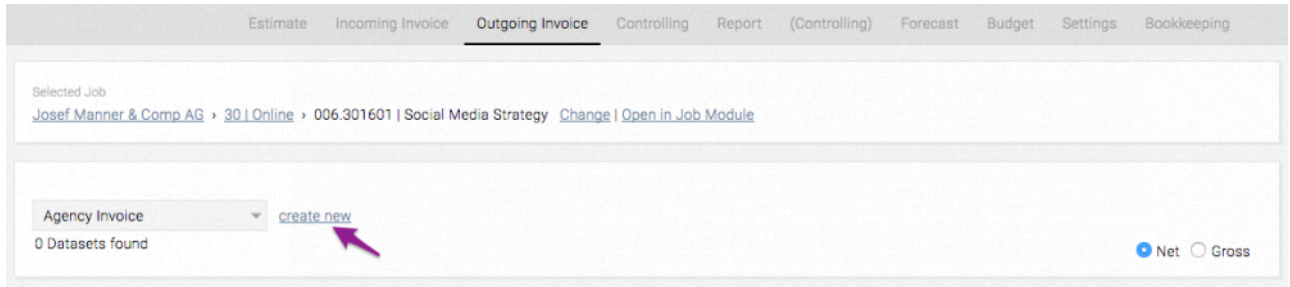
‘plus’: adding another cost of the same type

‘x’: resetting your current input

‘minus’: deleting a cost

How do I create a new outgoing invoice?

- Go to “Finances” > “Outgoing Invoice”
- Choose a job by filtering results by budget year, client, area and job, and click “select”
- Now, choose “Agency Invoice” or “Advance Invoice” and click “create new”



- Several fields might be already filled but can still be changed
- At the top of the details page, you can choose between several “Special functions” (not applicable for “Advance Invoice”):
 - Positions from estimate (only available for jobs with at least one existing estimate)
 - Bill OOP/Staff Expense
 - Transfer advance
 - Bill Service
 - Credit Note
- Click the green plus icon to add new costs and save them by clicking the green check icon
- Complete the invoice by clicking “Save”

TIP: when selecting a “Cost Type”, you can also choose from several special options, i.e. “Subheading”, “Inserted Text”, “Sub Total”, “Page break” and “Break / Balance”

Selected Job
[Josef Manner & Comp AG](#) > [30 | Online](#) > 006.301601 | Social Media Strategy [Change](#) | [Open in Job Module](#)

[Back to List](#)

Effective: 0.00 EST.: 3'300.00 P: 5'000.00 Advance: 0.00

Agency Invoice
in progress

Name
Rechnung

Invoice Number
»noch nicht vergeben«

Invoice date (Mon, 16.01.2017)
»Actual Date«

Period
☒ »automatically«

Payment Target (Wed, 15.02.2017)
30 Days

Specification

Receiver
Josef Manner & Comp AG
Contact person
Rechnungsadressestrasse
1060 Wien

Description
F X U

Currency Exchange Rate
CHF 04.08.2015

Cost Type — Text AS Calculate VAT Amount

+

Total excl. Vat 0.00

Save Reset Sort VAT 0.00

»Special function«
»Special function«
Positions from Estimate
Bill Out of Pocket
Transfer advance
Bill Service
Credit Note

EMPLOYEES

- [How do I enter holidays?](#)

How do I record/change absences?

Requirements:

- Required user permissions set in Admin
- Go to “Employees” > “Leave schedule”
- When clicking an employee’s name in the leftmost column, additional details are displayed on the right
- Click on the desired date in the employee’s row, and in the window that has now opened select the desired time frame (i.e. whole day or morning/afternoon), the reasons for the absence and the final day of absence (“enter until”)
- Save all data by clicking “OK”

- You can change any data for a recorded absence by clicking each of the corresponding “Correction” links in the box on the right (i.e. after selecting a specific employee): click on the green “plus” icon and enter a reason and the number of days (adapt them by clicking “+” or “-”)
- Save all data by clicking “OK”

Use Cases

- If you are **new** to **TEAMBOX**, we recommend working with our [First Steps](#) documentation.
- **More advanced users** might find the use cases and general information in *this* chapter more helpful.

GENERAL

In this section, you will find information on the following topics:

- [Where do I find TEAMBOX modules and their core features?](#)
- [How do I navigate around TEAMBOX modules?](#)
- [What are the basic navigational/operational elements throughout TEAMBOX?](#)
- [What other information can I access from the main navigation bar?](#)
- [How can users customize their TEAMBOX cockpit/start page?](#)
- [What other information can I access from the main navigation bar?](#)
- [How do I upload files to Teambox?](#)

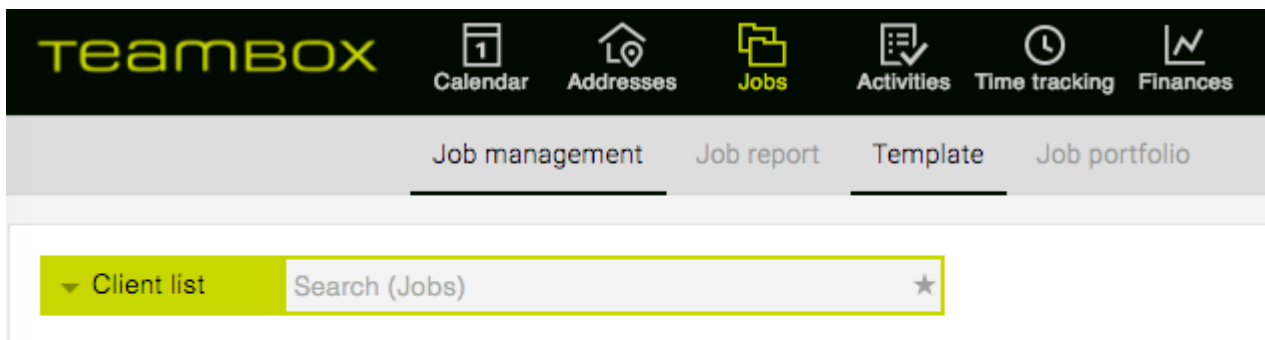
Where do I find TEAMBOX modules and their core features?

Steps

1. All of the **TEAMBOX modules** (e.g. "[Addresses](#)", "[Jobs](#)", "[Finances](#)" etc.) are accessed via the main navigation bar at the top – on mouseover, each module's core functionalities are displayed:



2. Clicking a module (e.g. "[Jobs](#)") will take you to its main window, with all core functionalities displayed as tabs within that module:



How do I navigate around TEAMBOX modules?

Steps

HINT: While working within a module, users can switch between all modules **without triggering a reload of the page; this facilitates working in different modules all at the same time without losing data.**

1. Enter some information while browsing a module (e.g. [open a job](#) and enter a “**Job description**” in the tab “**Job overview**”)
2. Click on a different module (e.g. enter a text in [“Activities”](#) > “**Activity list**” > “**Text search**”) without saving your changes
3. Go back to Jobs by clicking the “**Jobs**” module icon
=> You are taken back to the same “**Jobs**” page as before and any entered information (i.e. in “**Job description**”) is still there
4. Click the “**Activities**” module icon
=> You are taken back to the same “**Activities**” page as before and any entered information (i.e. in “**Text search**”) is still there

What are the basic navigational/operational elements throughout TEAMBOX?

Links

TEAMBOX uses an intricate network of links to facilitate navigation throughout the system; while working in the application, you might come across **two different types of links**:

- **standard links (blue font)**
 - are linked with elements such as other modules, submodules, documents or settings
- **job-related links (grey font)**
 - jobs and job-related elements are based on a more complex network of links, which is why for these elements users might encounter these (grey) as well as standard links

Operational icons

When working with **TEAMBOX** data, you might come across the following operational icons:



confirming operation; saving data



creating (and saving) a new element



cancelling; undo



deleting



moving (via drag and drop)



activating a deactivated element



deactivating an activated element



editing



uploading an image






copying and pasting

How can I customize my TEAMBOX cockpit/start page?

General information

When you navigate to the **TEAMBOX main page** (i.e. “cockpit”), you might see several **info boxes** (i.e. “**widgets**”) which display core information/functionalities or glimpses into larger data sets for several **TEAMBOX** modules.

All users can freely reposition their widgets (via drag&drop), resize them (icon: ) , display the information in full-screen mode (icon: ) or expand/collapse hidden/displayed

information (icon: ) .

One or several of the following widgets might be displayed on your start page:

- “[Time tracking](#)”
- “[Leave schedule](#)”
- “[Attendance](#)”
- “[My activities](#)” (displays your activities which can be completed, i.e. checked, directly in the widget or clicked to take you to the “Activities” module)
- “**News**” (from “**News**” module)
- “**Anniversaries**” (all upcoming employee anniversaries, gathered from the [employees’ start dates](#); click a name to see contact details)
- “**Birthdays**” (all upcoming birthdays for all contacts in “[Addresses](#)”; click their names to see contact details)
- “**Notes**” (a user’s personal, individual notepad)
- “**Facebook**” (configured during **TEAMBOX** initiation phase)
- “**Client status**” (a “[Controlling](#)” query, configured by *Intevo*)
- “**Work entry control**” (work control widget; visible to specified user groups only, e.g. CEOs)
- **Custom, agency-wide announcements** (displays custom news; accessible to specified user groups only, e.g. CEOs); highlighted in different colours depending on the recency of the news item (i.e. green/“fresh”, yellow/“established news” or white/“old news”)

Some users with advanced permissions may also include/exclude one or more widget(s) on/from their/ other users’ cockpit/s (in “[Admin](#)” > “[Permissions](#)” > “[Cockpit](#)”).

What other information can I access from the main navigation bar?

Steps

1. Enter a name (e.g. last name) in the **“Address search”** (no 1)
=> You are taken to the contact details page (for any matching contact) or to **“Addresses”** > **“Quick search”** (when there are no matches)
2. Click the question mark icon (no 2)
=> The **TEAMBOX** documentation (German) is displayed
3. Click the “Messages” icon (no 3)
=> The **“Messages”** module is opened
4. Click the cog icons (no 4)
 - a. Click **“Personal settings”**
 - i. Click *Job links*. Here you can select which actions should be available in the context menu in Job overview, Controlling, Address data of the client.
 - ii. *Password*: Here your own password can be changed anytime and as often as you like. For this, the old and the new password must be entered. Only strong passwords can be assigned. The check is carried out using a recognized algorithm.
 - iii. *Confidential e-Mail*: Here you can enter a confidential e-mail address. Only then, if the password is forgotten, a one-time password can be sent via the login mask.
 - iv. View: **“in the same window”** (integrates a module’s features as tabs in the page) or **“in separate window”** (opens a module’s features/tabs in new, separate windows)
 - b. Click **“System information”**
=> User login details are displayed (e.g. user name, roles, system version, their IP address etc.)
 - c. Click **“Support request”**
=> Opens your mail client to contact **TEAMBOX** support

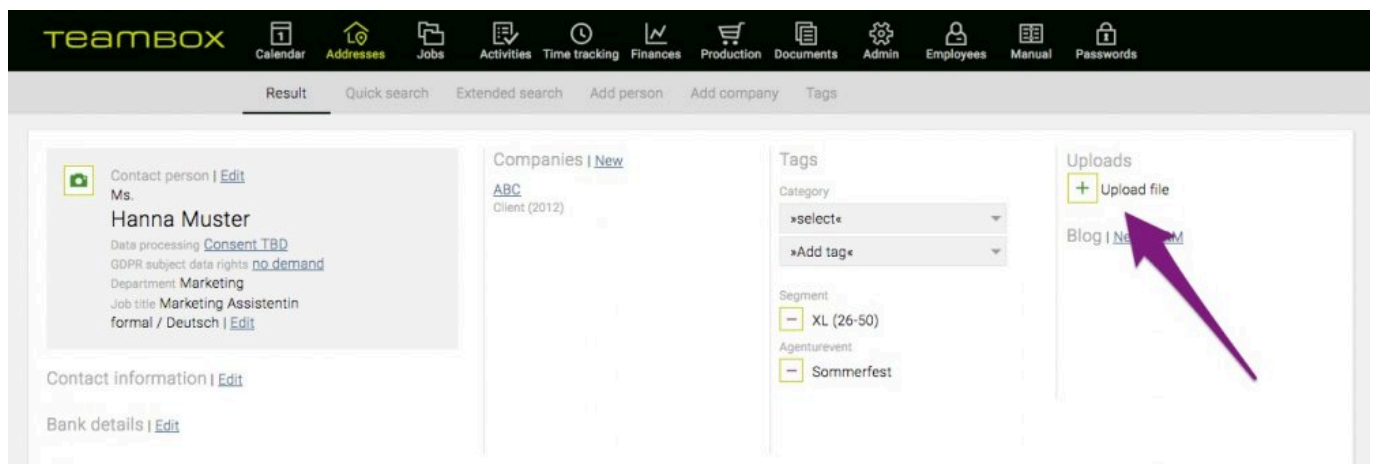


How do I upload files to TEAMBOX?

General info

There are several locations in the system where files can be uploaded (if the user has the relevant upload permissions), either via the 'plus' icon or simply via drag & drop in:

- **“Jobs“ > “Job management“ > “Uploads“**
- **“Addresses“ > “Result“ > “Uploads“**
- **“Activities“ > selected task > “Upload file“**
- **“Finances“ > “Incoming invoice“** (*=> will create a new invoice*)



MESSAGES

In this section, you will find information on the following topics:

- [What can I do with messages?](#)
- [What kinds of messages are there?](#)
- [How can I customize my “Messages”?](#)

What can I do with messages?

Schritte

1. Click the '*star*' icon (mouse-over: "**Flag**") to ...
 - a. ... prioritize a message so that it is moved to the highlighted, upper sections of the messages (different background colour)
2. Click the '*watch*' icon (mouse-over: "**Reminder**") to ...
 - a. ... set a reminder (preset or custom interval) for this particular event
3. Click the '*arrow*' icon (mouse-over: "**Forward**") to ...
 - a. ... forward this message to a colleague
4. Click the "**Change log**" button at the end of the page to ...
 - a. ... view the entire message log and search for / filter *all* messages

The screenshot displays the TEAMBOX interface with the following components:

- Navigation Bar:** Contains icons for 'Employees', 'Manual', and 'Passwords', an 'Address search' field, and a notification bell icon with a red '1'.
- Billed Agents Table:**

	Billed agen...	Billed agen...
IO	3'000.00	3'000.00
IO	1'000.00	1'000.00
..	150'320....	162'459....
IO	0.00	0.00
- Contact List:**

Extension	Last nam...
	Bauer
+41 1 9...	Bauer
	Berater
+41 44 ...	Brumm
- Messages Section:**
 - Message 1 (Highlighted):** "Nora Brumm hat das [Arbeitspaket 'Layout abnehmen'](#) geändert." with a timestamp of "Broschüre Fachhändler (Apple) | Wed, 18. Jul 18 18:14". It features a purple box around the action icons (star, watch, arrow).
 - Message 2:** "Nora Brumm hat das [Arbeitspaket 'Kundenfeedback abwarten'](#) erledigt." with a timestamp of "Broschüre Fachhändler (Apple) | Wed, 18. Jul 18 18:11". Its action icons are greyed out.

What kinds of messages are there?

General info

- “Messages” is an optional module and can be accessed by clicking the speech bubble symbol in the main navigation
- New, user-specific messages are created when certain *TEAMBOX* events trigger notification
- Messages have different priorities:
 - **“high”**: highly prioritized messages are displayed as pop-ups throughout the *TEAMBOX* (e.g. time-tracking reminder), are added to a user’s Messages ‘blog’, highlighted and flagged (i.e. star icon) and will always stay in the top section of the list unless the flag is removed (i.e. star icon is clicked)
 - **“middle”**: these messages are added to a user’s Messages ‘blog’, highlighted and flagged (i.e. star icon) and will always stay in the top section of the list unless the flag is removed (i.e. star icon is clicked)
 - **“low”**: low priority messages are added to a user’s Messages ‘blog’ without highlighting and are gradually moved to the **“Change log”**

How can I customize my “Messages”?

General info

Users can define the priority of each message (category) themselves.

Steps

1. In the main navigation bar, click the **“Messages”** icon in the upper-right corner
2. At the bottom of the page, click **“Settings”**
=> A new window opens up
3. In the tab **“Filter settings”**, click the name of the module that you want to change the message preferences for (e.g. **“Activities”**)
4. Within that category, choose the event that you want to customize the message for (e.g. **“A milestone is ... created”**)
5. Change the value of the ‘priority’ drop-down according to your preference (e.g. to **“high”**)
6. Once your done, click **“Save”**
=> Your filter settings have been saved.

Message log
Filter settings
Settings

Messages according to priority

	low	middle	high
View in journal and message window	✓	✓	✓
Pop up info		✓	✓
automatic flags			✓

▶ Direct message to me
▶ Advertising materials
▶ Production
▶ Employee
▶ Job
▼ Activities
▼ A milestone is
created
created in my job
created for me
changed
changed in my job
changed, and I am responsible for it
changed, and contains tasks for me
deleted
deleted in my Job
deleted and I am responsible for it
finished
finished in my job
finished and I am responsible for it
finished in my job (last milestone)
▶ A work package is
▶ A task is
▶ Finances

Priority

high
ignore
high
high
ignore
ignore
low
high
ignore
ignore
ignore
low
low

CALENDAR

In this section, you will find information on the following topics:

- [How can I create a new appointment?](#)
- [How can I invite participants?](#)
- [How can I work with public holidays?](#)

How can I create a new appointment?

General information

- You can choose to view the calendar entries based on a **“Week view”** or **“Month view”**
- You can filter for / display / hide specific appointments by using the filter options at the top:

Today Employee code ☒ all ☐ Mine

Custom “Admin” calendar settings

1. Go to **“Admin”** > **“Settings”** > **“Calendar”**
=> Here you can define/change calendar categories, colours and resources

Steps

1. In the main menu, click **“Calendar”**
=> The calendar is displayed in week view
2. Either use the arrows at the top (◀ WW 18/17 ▶) to flick through the weeks or click the calendar icon next to the arrows to select a specific date
=> The relevant week is displayed
3. Click on the small ‘plus’ icon in any of the three week sections (i.e. **“Morning”** for events between 8 a.m. and 12 noon, **“Afternoon”** for anything between 12 noon to 6 p.m. or **“Day”** for whole-day events) to create a new calendar event **OR** click the green ‘plus’ icon in the top-right corner
=> The **“Appointment”** window pops up, the fields **“Date”** and **“Time”** are preset to the selected date and time period (but can be changed freely)
4. Enter an **“Event title”**
5. You can select **“Private”** to block the appointment in the calendar while keeping others from reading the details of the event
6. You can enter a location at **“City/town”** (this will automatically turn the appointment into an external event)
7. You can adjust how frequently this event should occur by clicking **“change”** next to **“Repeat”**
8. You can add a **“URL”** and a **“Short description”** for this appointment
9. Optionally, you can enter participants’ names in **“External participants”** if you want to record their attendance without notifying them
10. You may choose the nature of the appointment from the drop-down **“Category”**
HINT: based on your **“Admin”** setup, the appointment will be displayed in a different colour depending on your selection – find out more below
11. You can link the appointment with a job selected at **“Job”**
HINT: your appointment will be displayed in your job (in **“Jobs”**)
12. You can also choose a specific **“Resource”** from the last field (e.g. the meeting room of your

choice)

HINT: after saving this appointment, the resource will be blocked (i.e. each resource can only be booked once within the same / an overlapping time period); you can define your resources in your **“Admin”** setup – find out more below

13. At the bottom of the window, click **“Save”**

=> The appointment has been created and is now displayed in the calendar

The screenshot displays the Teambox application interface. On the left, a calendar view shows the week of May 15th to 21st, 2017. A purple arrow points to a green '+' icon in the top left of the calendar grid. Another purple arrow points to a '+' icon on the date 15.5. (May 15th) in the 'Day' row. The right side of the interface shows the appointment form. At the bottom of this form, a yellow 'Save' button is visible. The form includes fields for Event title, City/town, Employees (with 'Me' selected), External participants, Date (15.5.2017), Time (whole day), Repeat (change), URL, Short description, Category (automatic), Job (Client list), and Resources.

How can I invite participants?

Steps

1. Create a new appointment in the “**Appointment**” window and add participants:
 - a. either by entering their employee code at “**Employees**” or
 - b. by clicking the departments displayed underneath (you can select and deselect individual colleagues from this department or add the whole department by checking the checkbox)

HINT: after selecting participants, click “**Show availability**” to check for availability conflicts

 - c. or use the “**Invite**” field to add participants that might not be part of any department
 2. Next, ...
 - a. enter their name and select the name from the suggestions or
 - b. click the green ‘plus’ icon to add the email address for external participants (confirm by clicking the ‘plus’ again)
 3. At the bottom of the page, click “**Save**”
- => Participants will receive a notification that the appointment has been created

HINT: optionally, you can enter participants' names in “**External participants**” if you want to record their attendance without notifying them

How can I work with public holidays?

Using pre-defined holidays

Based on your installation, your system comes with a set of pre-defined public holidays specific to your location that you may want to adapt:

1. Go to **“Calendar” > “Holiday selection”**
2. Select (deselect) all holidays you do (not) want to use in your system
3. Navigate to the tab to the left, i.e. **“Holidays”**
=> A miniature calendar is displayed, indicating all the public holidays that have already been correctly set for your system; these are listed in **“Holidays already set”**
=> Your previously selected holidays are listed in **“Holidays that have not been set”**
4. Click any of the holidays from the list of non-set holidays
=> A pop-up window (i.e. **“Enter holidays”**) is displayed
5. (OPTIONAL) If applicable, you can adjust the **“Description”** (e.g. holiday name) and **“Date”** to your needs
HINT: you can define the date either by entering it in the date field or simply by clicking the day in the miniature calendar
6. At **“Duration”**, select whether the holiday will account for a whole or half day off
7. Click **“OK”** to finish editing this holiday
8. Repeat the procedure for all non-set holidays
9. Once there are no more entries in **“Holidays that have not been set”**, click **“Save”** at the bottom of the page

HINT: If you don't want to change anything about the pre-defined holidays, you can also click **“Set holidays automatically”** at the bottom of the page – don't forget to click **“Save”** at the end if you're happy with the result

Adding a new, custom holiday

1. At the bottom of the page, click **“Add new holiday”**
2. Fill out **“Description”**, **“Date”** and **“Duration”**
HINT: see **“USING PRE-DEFINED HOLIDAYS”** above for more information on each field
3. Click **“OK”** at the end of the window
=> The new holiday is now listed in **“Holidays already set”**

Calendar year
2017

Holidays already set

- 1.1. Neujahrstag
- 6.1. Heilige 3 Könige
- 23.2. Schmutziger Donnerstag
- 14.4. Karfreitag
- 16.4. Ostern
- 17.4. Ostermontag
- 24.4. Sechseläuten
- 1.5. Tag der Arbeit
- 25.5. Auffahrt / Christi Himmelfahrt
- 4.6. Pfingsten
- 5.6. Pfingstmontag
- 15.6. Fronleichnam
- 1.8. Nationalfeiertag
- 15.8. Mariä Himmelfahrt
- 11.9. Knabenschieszen
- 17.9. Eidgenössischer Dank-, Buss- und Bettag
- 1.11. Allerheiligen
- 24.12. Heiliger Abend
- 25.12. Weihnachtstag
- 26.12. Stephanstag

Holidays that have not been set

January							February							March									
WW	Mo	Tu	We	Th	Fr	Sa	Su	WW	Mo	Tu	We	Th	Fr	Sa	Su	WW	Mo	Tu	We	Th	Fr	Sa	Su
						1	5				1	2	3	4	5	9			1	2	3	4	5
1	2	3	4	5	6	7	8	6	6	7	8	9	10	11	12	10	6	7	8	9	10	11	12
2	9	10	11	12	13	14	15	7	13	14	15	16	17	18	19	11	13	14	15	16	17	18	19
3	16	17	18	19	20	21	22	8	20	21	22	23	24	25	26	12	20	21	22	23	24	25	26
4	23	24	25	26	27	28	29	9	27	28						13	27	28	29	30	31		
5	30	31																					

April							May							June									
WW	Mo	Tu	We	Th	Fr	Sa	Su	WW	Mo	Tu	We	Th	Fr	Sa	Su	WW	Mo	Tu	We	Th	Fr	Sa	Su
13						1	2	18	1	2	3	4	5	6	7	22				1	2	3	4
14	3	4	5	6	7	8	9	19	8	9	10	11	12	13	14	23	5	6	7	8	9	10	11
15	10	11	12	13	14	15	16	20	15	16	17	18	19	20	21	24	12	13	14	15	16	17	18
16	17	18	19	20	21	22	23	21	22	23	24	25	26	27	28	25	19	20	21	22	23	24	25
17	24	25	26	27	28	29	30	22	29	30	31					26	26	27	28	29	30		

July							August							September									
WW	Mo	Tu	We	Th	Fr	Sa	Su	WW	Mo	Tu	We	Th	Fr	Sa	Su	WW	Mo	Tu	We	Th	Fr	Sa	Su
26						1	2	31		1	2	3	4	5	6	35					1	2	3
27	3	4	5	6	7	8	9	32	7	8	9	10	11	12	13	36	4	5	6	7	8	9	10
28	10	11	12	13	14	15	16	33	14	15	16	17	18	19	20	37	11	12	13	14	15	16	17
29	17	18	19	20	21	22	23	34	21	22	23	24	25	26	27	38	18	19	20	21	22	23	24
30	24	25	26	27	28	29	30	35	28	29	30	31				39	25	26	27	28	29	30	
31	31																						

October							November							December									
WW	Mo	Tu	We	Th	Fr	Sa	Su	WW	Mo	Tu	We	Th	Fr	Sa	Su	WW	Mo	Tu	We	Th	Fr	Sa	Su
39						1		44			1	2	3	4	5	48					1	2	3
40	2	3	4	5	6	7	8	45	6	7	8	9	10	11	12	49	4	5	6	7	8	9	10
41	9	10	11	12	13	14	15	46	13	14	15	16	17	18	19	50	11	12	13	14	15	16	17
42	16	17	18	19	20	21	22	47	20	21	22	23	24	25	26	51	18	19	20	21	22	23	24
43	23	24	25	26	27	28	29	48	27	28	29	30			52	25	26	27	28	29	30	31	
44	30	31																					

Save
Add new holiday
Set holidays automatically

Page 46 of 201

How can I sync/subscribe to calendars?

General

- TEAMBOX enables you to sync your agency calendar with other calendars.
- **Unfortunately, different kinds of hard- and software operate differently, which is why intevo.websolutions has come up with the most flexible solution.**
- **Syncing is optimized or, whenever not possible, users can at least subscribe to the agency calendar to remain up-to-date.**

(a) SUBSCRIBING to a calendar (one-way TEAMBOX > device)

Per definition, subscribing is a one-way means of communication. Calendar events CANNOT be edited on the device – this is only possible in TEAMBOX.

Subscribing is possible for:

- your own calendar events, (public) holidays and off-days
- all other TEAMBOX users' (public) holiday calendars
- one other user's (public) holidays
- TEAMBOX custom holidays
- Editing information is only possible within TEAMBOX
- **Suitable software:** iCal/Calendar, GoogleCalendar, Outlook

(b) SYNCING calendars (two-way TEAMBOX <=> device)

Syncing is possible for:

- Syncing your own calendar events, (public) holidays and off-days via CalDAV interface
- Any event added to TEAMBOX will be automatically synced on this device and vice versa
- Optional feature (subject to a fee) that needs to be purchased and activated
- **Suitable software:** iCal/Calendar

Subscription details

- Events created on the device will NOT be synced with TEAMBOX
- Events contain direct links – copy and paste the URL into your browser to edit the event
- Once you sync your calendar (e.g. Outlook) with a smartphone (such as Blackberry, Palm, etc.), you will have access to your TEAMBOX events from this device (one-way only)
- Events, holidays and offdays will be available for an unlimited amount of time using your personal calendar (iCal etc.)

- From Mac OS C 10.7 onwards, subscribing to events (to dos) is not supported by Apple any more

How can I subscribe to a calendar using iCal?

General

- how to subscribe to the TEAMBOX.calendar and view calendar events in your personal Mac calendar
 - **subscribing = one-way communication between TEAMBOX and iCal, changes can only be performed in TEAMBOX**
- Setup**

Steps

1. Select **'Subscribe'** in **'Calendar'**
2. To not transfer certain entries, remove the corresponding check mark for events, activities, holidays and offdays.
3. Click the link **'URL copied to clipboard'**
=> the subscription link has been generated and copied to clipboard
4. Copy the link and open iCal
5. In Mac calendar, go to **'File' > 'New Calendar Subscription'**
6. Copy and paste the previously generated link in the field **'Calendar URL'**
7. Click **'Subscribe'**
8. To test the new calendar, create a new event in TEAMBOX
=> The event will be displayed in your Mac calendar

Additional setup parameters

- **Name:** your calendar's name in Mac calendar (which will be displayed in the left calendar panel)
- **Colour:** define your calendar events' colour
- **Location:** can be 'local' (on your Mac only), 'iCloud' (will sync this calendar with your other devices)
- **Automatic updates:** define the intervals for automatic updates

PLEASE NOTE:

- **The link reflects the current TEAMBOX user, which means that you're subscribing to this user's events. The combination of letters and numbers at the end of the link make automatic authentication possible.**
- Clicking the event will display all relevant details, such as participant, date, time and date, the detailed description and the direct link to the event.
- **Subscribing to a calendar is a one-way means of communication. You CANNOT edit an event in Mac calendar (this is only possible in TEAMBOX).** However, you will find the direct link in the event details which you can copy and paste into you browser to view and edit the event

in TEAMBOX.

Scenarios

Subscribing to a team member's events

1. To subscribe to a team member's events, click '**new calendar subscription**'
2. Copy and paste "your" URL in the Mac calendar field and change the URL (i.e. replace your short name, e.g. "doba", by your colleague's short name).
3. The calendar panel will now display your colleague's calendar.

Subscribing to ALL employees' holidays

1. Simply replace your short name (e.g. "doba") by "vacation" and leave the rest of the link as it is.
2. The calendar panel will now display all employees' holidays in one calendar.

Subscribing to public holidays

1. To display TEAMBOX's public holidays in your calendar, go to **TEAMBOX > "Subscribe" > "Public holidays calendar"** to generate a subscription link. To display TEAMBOX's public holidays in your calendar, select the "URL copied to clipboard" link under "Subscribe"> "Holiday Calendar" * to generate a subscription link for the holidays.
2. Then, carry out the previously described steps in Mac calendar (open Mac calendar – new calendar subscription – copy and paste URL – etc.).
3. The calendar panel will now display TEAMBOX public holiday calendar.

Lock access to calendar

1. Go to TEAMBOX> "Calendar"> "Subscribe" and click on the button "Create new URL"
2. The old URL thus loses its validity
3. Then set up the new URL in your Mac calendar as described above.

How can I subscribe to a calendar using Outlook?

General

- How to subscribe to the TEAMBOX calendar using your personal Outlook calendar
- **Subscribing to a calendar is a one-way means of communication between TEAMBOX and Outlook**

Steps

1. Select **'Subscribe'** in **'Calendar'**
2. Choose the relevant calendars next to **'My Calendar'** (your events, to dos, holidays, offdays)
3. Click **'My Calendar'**
=> the subscription link has been generated
4. Open **Outlook > 'Calendars'**, click **'Open calendar' > 'From the internet / online calendar'** and copy and paste the previously generated subscription URL
5. Confirm the subscription in Outlook and click the Button **'Advanced'** to adjust the calendar name and description in Outlook
6. To test the new calendar, create a new event in TEAMBOX
=> The event will be displayed in your Outlook calendar

Scenarios

Subscribing to a team member's events

1. To subscribe to a team member's events, click **'new calendar subscription'**, copy and paste "your" URL in the Outlook field and change the URL (i.e. replace your short name, e.g. "doba", by your colleague's short name).
2. The calendar panel will now display your colleague's calendar.

Subscribing to ALL employees' holidays

1. Simply replace your short name (e.g. "doba") by "vacation" and leave the rest of the link as it is.
2. The calendar panel will now display all employees' holidays in one calendar.

Subscribing to public holidays

1. To display TEAMBOX's public holidays in your calendar, go to **TEAMBOX > "Subscribe" > "Public holidays calendar"** to generate a subscription link.
2. Then, carry out the previously described steps in iCal (open iCal – new calendar subscription – copy and paste URL – etc.). The calendar panel will now display TEAMBOX public holiday calendar.

How can I subscribe to a calendar using Google Calendar?

General

- How to subscribe to the TEAMBOX.calendar and view calendar events in your personal Google Calendar
- **Subscribing = one-way communication between TEAMBOX and Google Calendar, changes can only be performed in TEAMBOX**

Steps

1. Select '**Subscribe**' in '**Calendar**'
2. Choose the relevant calendars next to '**My Calendar**' (your events, to dos, holidays, offdays)
3. Click '**My Calendar**'
=> the subscription link has been generated
4. Copy the link and open Google Calendar
5. In Google Calendar, go to '**More calendars**' > '**Add via URL**'
6. Copy and paste the previously generated link in the field '**URL**'
7. Click '**Confirm**'

PLEASE NOTE:

- The link reflects the current TEAMBOX user, which means that you're subscribing to this user's events. The combination of letters and numbers at the end of the link make automatic authentication possible.
- Clicking the event will display all relevant details, such as participant, date, time and date, the detailed description and the direct link to the event.
- **Subscribing to a calendar is a one-way means of communication. You CANNOT edit an event in Google Calendar (this is only possible in TEAMBOX).** However, you will find the direct link in the event details which you can copy and paste into you browser to view and edit the event in TEAMBOX.

Scenarios

Subscribing to a team member's events

1. To subscribe to a team member's events, click 'new calendar subscription', copy and paste "your" URL in the Google Calendar field and change the URL (i.e. replace your short name, e.g. "doba", by your colleague's short name).
2. The calendar panel will now display your colleague's calendar.

Subscribing to ALL employees' holidays

1. Simply replace your short name (e.g. "doba") by "vacation" and leave the rest of the link as it is.
2. The calendar panel will now display all employees' holidays in one calendar.

Subscribing to public holidays

1. To display TEAMBOX's public holidays in your calendar, go to **TEAMBOX > "Subscribe" > "Public holidays calendar"** to generate a subscription link.
2. Then, carry out the previously described steps in Google Calendar. The calendar panel will now display TEAMBOX public holiday calendar.

How can I sync a calendar with an Android phone?

General info

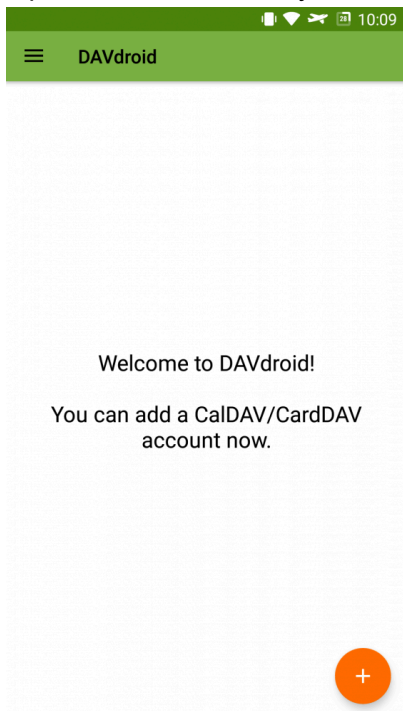
- Card and CalDAV synchronisation on Android is only supported via third-party apps – none of these (as far as we're aware) are free of charge. **Thus, we recommend using the app “DAVdroid”.**

URL: <https://www.davdroid.com>

PlayStore: <https://play.google.com/store/apps/details?id=at.bitfire.davdroid>

Steps

1. Open “**DAVdroid**” on your Android phone



2. Add a new account by tapping the “+” button

10:09

← Add account ?

✗ Login with email address

✓ Login with URL and user name

Base URL
https://live.teambox.eu/dav

User name
INFO

Password
.....

✗ Login with URL and client certificate

LOGIN

3. Choose **“Login with URL and user name”**
4. Enter your TEAMBOX URL ending in **“/dav”** (e.g. “https://live.teambox.eu/dav”) and your TEAMBOX credentials
5. Tap the button **“Login”**

10:09

← Add account ?

✗ Login with email address

✓ Login with URL and user name

Base URL
https://live.teambox.eu

User name
INFO

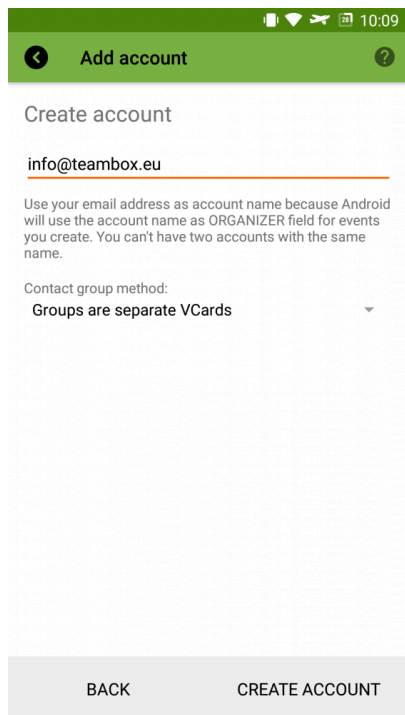
Pa
•

Configuration detection

Please wait, querying server...

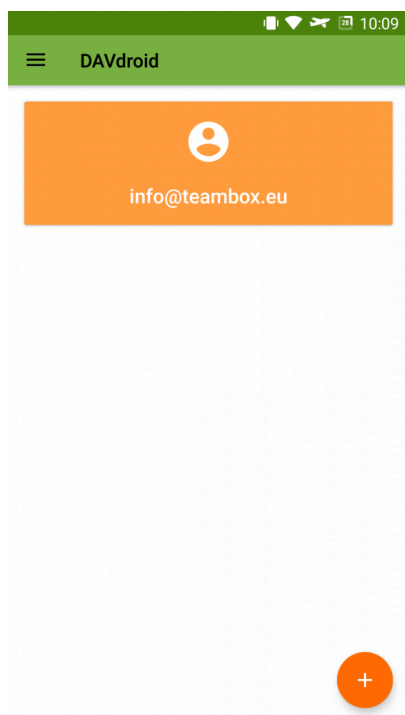
LOGIN

6. The entered configuration details are being evaluated

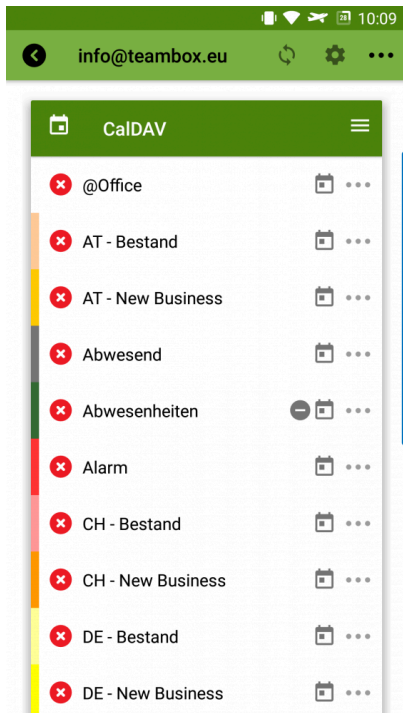


7. Add your email account

Android expects the account name to match the associated email address so that calendar invites can be matched



8. Tap your newly created email account



9. All available calendars are being listed and can be subscribed to
10. Clicking the cog wheel icon will display advanced options (e.g. for defining the synchronisation interval, such as a 4-hour interval (default value))
=> CalDAV has been successfully configured.
=> From now on, all TEAMBOX events will be displayed on your Android phone and can now be edited, deleted or newly created

How can I sync a calendar with an iPhone?

Steps

1. On your iPhone, go to “**Settings**”
2. Tap “**Accounts & Passwords**”
3. Tap “**Add Account**”
4. Choose “**Other**”
5. Tap “**Add CalDAV Account**”
6. Enter your TEAMBOX server details and tap “**Next**”
 - a. “**Server**”: your TEAMBOX domain (e.g. “myteambox.teambox.ch”)
 - b. “**Username**” & “**Password**”: your TEAMBOX login details
 - c. “**Description**”: define a custom name for your calendar

=> From now on, your TEAMBOX calendar events will be displayed on your iPhone and can now be edited, deleted or newly created

How can I sync a calendar using iCal?

Steps

1. Open **“Calendar”** / **“iCal”** on your Mac
2. In **“Calendar”**, select **“Settings”**
3. Go to **“Accounts”** and click the **“+”** icon to create a new account
=> **“Add account”** pop up is displayed
4. Choose **“Add CalDAV account”**
5. Change the account type to **“Manual”**
6. Enter your TEAMBOX server details:
 - a. **“Username”** & **“Password”**: your TEAMBOX login details
 - b. **“Server”**: your TEAMBOX domain (e.g. **“myteambox.teambox.ch”**)
7. Click **“Create”** / **“Login”**
8. (optional) You might have to grant permanent permissions for this security certificate (click **“Yes”**)
=> Your CalDAV account has been successfully created

Optional additional settings

1. **“Account information”**: change this to define custom synchronization intervals for your calendar
2. **“Server settings”**: add your port (only necessary if you're hosting TEAMBOX on your own servers – please contact your system administrator for more details)

ADDRESSES

In this section, you will find information on the following topics:



- [How do I work with Extended Search?](#)
- [How can I export addresses as a .csv file?](#)
- [How can I generate address labels?](#)
- [How do I add a new company?](#)
- [How do I add a new employee?](#)
- [How can I activate work entry control?](#)
- [How can I generate or renew a password for a user?](#)
- [Where can I define off days for a user?](#)
- [How do I create and use blog entries?](#)
- [How can I create or edit tags?](#)
- [How can I assign/remove a tag to/from a contact?](#)

How do I work with “Extended search”?

General information

- use the extended search to filter for specific criteria when viewing contact details

Steps

1. Go to **“Addresses”** > **“Extended search”**
2. At **“Search criteria”**, select your first search criterion from the drop-down list (e.g. **“Address”**)
=> the criterion is displayed as text and, depending on the chosen criterion, subordinate search criteria for the selected one are displayed
3. From the now displayed drop-down list, select a subordinate criterion (e.g. **“City/Town”**)
4. Enter a search criterion in the text field next to the list (e.g. **“London”**)
5. (optional) Repeat the previous steps to add more search criteria
6. (optional) At **“Show fields”**, click **“Edit”** to adapt the information displayed with the search results
 - a. Click one/several field(s) (multi-select possible) in the left-most column **“Available fields”**

and click the right-faced arrow  to display this information for each line of the search results (e.g. **“Person | phone number”**)
 - b. Likewise, click the left-faced arrow to remove specific displayed information
 - c. Use the right-most column **“Displayed tags”** to display tags associated with each search result
7. Once you're happy with your query, click **“Search”** at the bottom of the page
=> All the matching records for your search are displayed, (optionally) including any extra information set in **“Show fields”**

SAVING QUERIES: At the bottom of the page, click **“Save search result”** > enter a name for your query => once the query has been saved, you can apply them in **“Addresses”** > **“Quick search”** > **“saved search queries”**

Search criteria

»select«

Available fields

Person | Kommentar
Person | Titel
Person | Anrede
Person | Geschlecht
Person | Sprache
Person | Geburtstag
Person | Email
Person | Tel. Privat
Person | Fax Privat
Person | Tel. Direkt
Person | Tel. Mobil
Person | Tel. Sonstiges
Person | Fax Direkt
Person | Adressgruppe
Kontaktperson | Funktion
Kontaktperson | Abteilung
Mitarbeiter | Kürzel

⇌

Displayed fields

Person | Nachname
Person | Vorname
Firma | Firmenname

↑↓

Displayed tags

Filter tags x

Person tags + -
▶ ☐ Jahresbericht
▶ ☐ Adressverantwortung
▶ ☐ Newsletter
▶ ☐ Weihnachtskarte
▶ ☐ New Business
▶ ☐ Einladungen
▶ ☐ Segment
▶ ☐ Kategorie
▶ ☐ Stiftung Sonne
▶ ☐ Weihnachtsgeschenk
▶ ☐ Agenturevent
▶ ☐ Verbände
▶ ☐ Medien
▶ ☐ Freizeitsport

Search

Reset

How can I export addresses as a .csv file?

Steps

1. Use **“Quick search”** or **“Extended search”** to filter for the contact information you are looking for
2. At the bottom of the page, click the button **“Export”**
=> The export configuration is displayed in a new page
3. At **“Character encoding”**, select the export format (i.e. recent/older Excel versions or **“Standard-CSV UTF-8”**)
4. (optional) At **“Mail merge fields”**, you can select the **“personal salutation”** and/or **“Greeting (phrase)”** for that contact in the export file, based on the respective data set for that contact (e.g. “Kind regards” vs. “Yours sincerely”)
5. (optional) At **“Language”**, you can change the default language for the export
6. At **“Reason for the export”**, you must enter a reason, which will then be displayed in the change log
7. At the end of the page, click **“Export”**
=> The data is exported to a new external file

Character encoding
Excel 2009/2011
UTF-16 (Little Endian), Tab separated,
best for Excel Versions after 2009 (Win
and Mac)

Reason for the export

Mail merge fields
☐ personal salutation
☐ Greeting (phrase)
[Language Deutsch]

Export format
☒ CSV ☐ PDF

Export Cancel

Nachname							
Nachname	Vorname	Firmenname	Strasse	PLZ	Ort	Anrede	Gruss
Baumgärtel	Anne	Adidas	Münzstraße	10178	Berlin	Dear Anne	Kind regards,
Deutschman	Dirk	IKEA	Ikeastrasse	10997	Berlin	Dear Mr Deu	Yours sincerely,
Fuxberger	Thomas	Adidas	Münzstraße	10178	Berlin	Dear Mr Fux	Yours sincerely,
Puma	Hans	Puma	Pumastrasse	10623	Berlin	Dear Hans	Kind regards,
Schnell	Michael	Adidas	Münzstraße	10178	Berlin	Dear Mr Sch	Yours sincerely,
Schuster	Sepp	Adidas	Münzstraße	10178	Berlin	Dear Sepp	Kind regards,

How can I generate address labels?

Please note

- **This feature is not part of your standard TEAMBOX installation package**, but can be integrated and customized to your system.
- Depending on your use case, the customization may feature mass address label exports for multiple contacts or individualized label generation. Please use the provided contact information for more details: support@intevo.net

Steps

1. Use **“Quick search”** or **“Extended search”** to filter for the contact information you are looking for
2. At the bottom of the page, click the button **“Export”**
3. At **“Export format”**, select **“PDF”**
=> The exported address labels have been saved as .pdf file to the custom location (as defined in the feature configuration)

HINT: The entire look and feel of the address labels will be customized to your needs as part of the feature integration.



[Österreich](#) [Deutschland](#) [Italien](#) [Schweiz](#)

 <div>Herr Anne Baumgärtel Adidas Münzstraße 13 D-10178 Berlin</div>	 <div>Herr Dirk Deutschmann IKEA Ikeastraße D-10997 Berlin</div>
 <div>Herr Thomas Fuxberger Adidas Münzstraße 13 D-10178 Berlin</div>	 <div>Herr Hans Puma Puma Pumastraße 4 D-10623 Berlin</div>
 <div>Herr Michael Schnell Adidas Münzstraße 13 D-10178 Berlin</div>	 <div>Herr Sepp Schuster Adidas Münzstraße 13 D-10178 Berlin</div>

How do I add a new company?

Steps

1. Go to **“Addresses“** > **“Add company“**
2. Specify the **“Company name“** and enter the **“First name“** and **“Last name“** of the associated contact
3. At the bottom of the page, click **“New“**
=> A duplicate check for the company name is displayed on the right side of the page
4. Click **“New“** again to (re)define the company details
=> More contact details are displayed and can be (re)defined (e.g. **“Status“**, **“Suffix“**, **“Homepage“**, **“Payment period (Supplier)“**, **“VAT No./TAX No./UID“**, **“Our client number“** as well as debtor, creditor and account information)
5. At the bottom of the page, click the button **“Save“**
=> A duplicate check for the contact name is displayed on the right side of the page
6. Click **“New“** again to (re)define the contact details
7. (not optional) Select **“male“** or **“female“** at **“Gender“**
8. Specify more details (e.g. **“Salutation“**, **“Agency salutation“**, **“Agency language“**, **“Birthday“**, **“Department“**, **“Job title“**, **“Partner’s name“** or **“Partner’s birthday“**)
9. At the bottom of the page, click the button **“Save“**
10. In the Bubble **“Consent of person to processing of personal data“** between consent granted/ open and enter something at Extra Info
11. Confirm this with **“OK“**
=> The contact **“Result“** page is displayed, the message **“Person created“** is displayed and the company and contact details have been added to the database. All previously entered data can be changed here.

Result	Quick search	Extended search	Add person	<u>Add company</u>
--------	--------------	-----------------	------------	--------------------

Company name

(Leave empty if not available)

Contact person or freelancer

First name

Last name

How do I add a new employee?

Steps

1. Either, ...
 - a. go to **“Addresses“** > **“Add person“**, specify the employee data and select **“Employee“** from the drop down **“Status“** **OR**
 - b. go to **“Employees“** > **“Add employee“** and specify the employee details
2. At the bottom of the page, click **“New“**
=> A new page is displayed to (re)define the employee details
3. Select a value from **“Department“** to add the employee to an existing department (group)
4. Select a value from **“Function“** to match the new employee with the correct pricing model and optionally define a custom **“Hourly rate“** for this employee
5. At **“Code“**, specify the employee code/abbreviation
 - a. **HINT**: this will be displayed throughout the system and also serves as username for logins
6. At **“Start date“**, enter the employee’s first official working day
 - a. **HINT**: this will affect the user’s login permissions (date), vacation details (number of available holidays) and your agency’s resource management (i.e. the availability of the employee for jobs)
 - b. Likewise, change **“Termination“** date to the employee’s last working day to reverse the above mentioned effects when this person leaves the company
7. At the bottom of the page, click **“Save“**
=> The new employee has been created

The screenshot shows the 'Add person' form in the TEAMBOX interface. The form is divided into four tabs: 'Result', 'Quick search', 'Extended search', and 'Add person'. The 'Add person' tab is active. The form contains the following fields:

- First name**: A text input field.
- Last name**: A text input field.
- Status**: A dropdown menu with 'Employee' selected. A purple arrow points to this dropdown.

At the bottom of the form, there are three buttons: 'New' (highlighted in yellow), 'Search', and 'Cancel'.

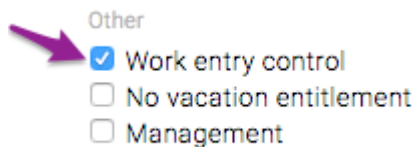
How can I activate 'work entry control'?

General information

- In order to encourage employees to record their work hours in the system, the **“Work entry control”** can be (de)activated for each user. This means that, for regular intervals during the logged-in session, a pop-up reminder is displayed to the user reminding them to record their work hours for the previous day(s) in case they have failed to do so.

Steps

1. Use **“Quick search”** or **“Extended search”** to filter for the employee
2. On the contact page, click **“Edit”**
3. Towards the bottom of the page, check **“Work entry control”** to activate the reminder or uncheck it to deactivate it
4. At the bottom of the page, click the button **“Save”**
=> Work entry control for the user has now been (de)activated



How can I generate a password for a user?

General information

- **“Permissions and password”**, as described below will only be displayed if an employee has been successfully added to the system

HINT: You can find out how the user himself can change his password and set a confidential email address at the end of this article.

Steps

1. Use **“Quick search”** or **“Extended search”** to filter for the employee
2. On the contact page, click **“Edit”**
3. Click **“Edit”** next to the text **“Permissions and password”**

Permissions and password | [Edit](#)
4. Beratung
=> a new page is displayed
5. Next, check one or several roles at **“Roles”**
 - a. **HINT:** the permissions linked to each role can be (re)defined in **“Admin”**
6. Click on the Button **“Create one-time password”**
7. A popup window **“Create one-time password for ...”** is shown
 - a. You can now enter a “confidential email address” and the one-time password will be sent to this address. **Or** if a “confidential email address” of the user has already been stored in the TEAMBOX, the one-time password will be send to this address
8. Click the button “Send one-time password”
9. If you have made changes to the roles, click on **“Save”**

Employee
Beate Berater

Roles

- ☐ Administration
- ☐ Geschäftsleitung
- ☐ Projektleitung
- ☐ Kreation
- ☒ Beratung
- ☐ Freelancer
- ☐ Produktion

Create one-time password for beate

This function enables the setting of the first password or allows users to reset a forgotten password.

If the user is currently logged in to the TEAMBOX, he/she will be logged out and can only log in again with the one-time password.

☐ Send one-time password to the user's existing confidential e-mail address

☒ Set new confidential e-mail address and send one-time password to it

Email Address

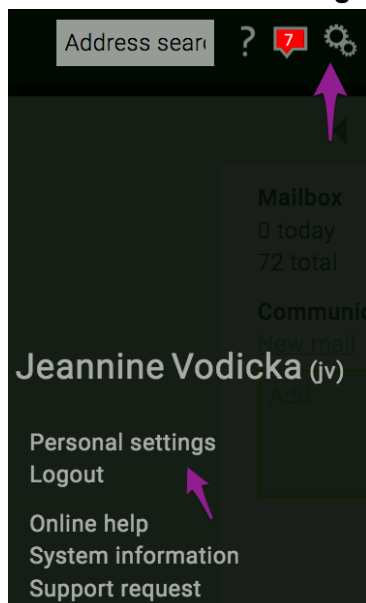
If a new confidential e-mail address is set, the user receives an additional e-mail for security reasons.

Send one-time password
Cancel

Save
Create one-time password
Cancel

Change your own password and set a confidential email address in the TEAMBOX

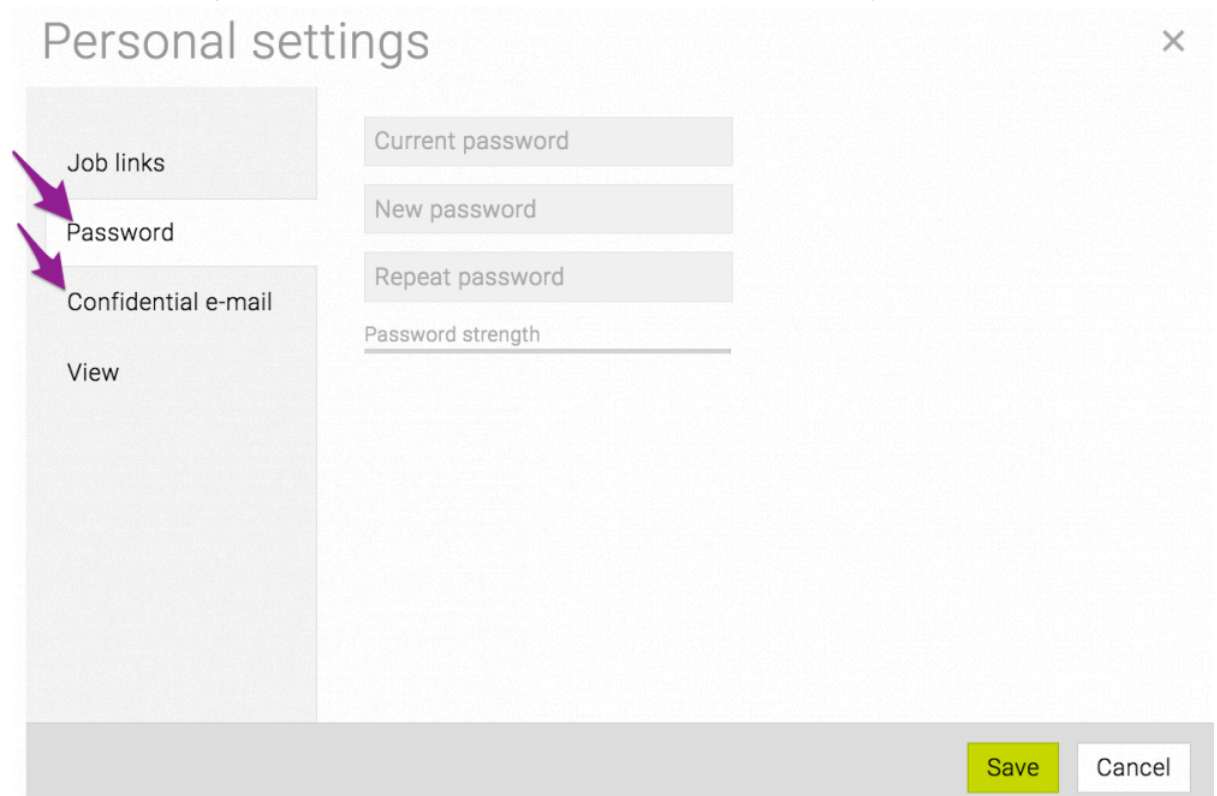
- Click on the gear symbol right above in your TEAMBOX
- Click on **Personal Settings**



- *Password:* Here your own password can be changed anytime and as often as you like. For this, the old and the new password must be entered. Only strong passwords can be

assigned. The check is carried out using a recognized algorithm.

- *Confidential email*: Here you can enter a confidential e-mail address. Only then, if the password is forgotten, a one-time password can be sent via the login mask.



Personal settings ×

Job links

Password

Confidential e-mail

View

Current password

New password

Repeat password

Password strength

Save

Cancel

Where can I define off days for a user?

General information

- Using **“Off days”** is a convenient way to define individual work models for more flexible/part-time employees.
- All changes made to **“Off days”** will affect resource planning (i.e. the employee’s availability on specific days).

Steps

1. Use **“Quick search”** or **“Extended search”** to filter for the employee
2. On the contact page, click **“Edit”**
3. Click **“Edit”** next to the text **“Off days”**
=> A new page is displayed
4. Using the **“Off days”** chart, check all days on which, by contract, the employee does not work
 - a. **HINT1:** **“M”** indicates “morning“, **“A”** indicates “afternoon“
 - b. **HINT2:** each checkbox in each line represents 10% of the overall weekly work hours; more individual work models can be customized in the TEAMBOX database – please contact your support for more information
5. At **“Valid from”** set the start date for this work model – these dates can be set to be past, present or future
6. At the bottom of the page, click **“Add”**
=> the contact details edit page is displayed, the off days are now displayed
7. At the bottom of the contact details edit page, click **“Save”**
=> the off days have now been saved and any changes are recorded in **“Off days” > “History”**
(**“W”** = whole day; **“M”** = morning; **“A”** = afternoon)

Employee		History					
<u>Tom Bauer</u>		from	Mon	Tue	Wed	Thu	Fri
Off days							
	Mon	Tue	Wed	Thu	Fri		
M	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
valid from							
19	▼	Jul	▼	2017			

Add

Back

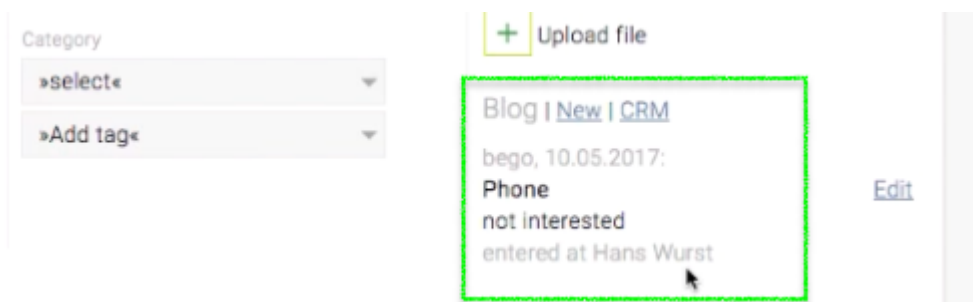
How do I create (and use) blog entries?

General information

- **HINT:** this feature can be useful for documenting (the number of) calls established/attempted with a specific contact person and/or company.

Steps

1. Use **“Quick search”** or **“Extended search”** to filter for the contact
2. On the contact page, click **“Blog > Details”**
3. Click **“Blog > New”**
4. Enter the details for the blog entry (e.g. date, title, comment)
 - a. **HINT:** clicking **“link to company”** will save the record for this contact and his/her company’s blog
5. Click **“Save”** (underneath the blog entry)
 - => the blog entry has been saved for the contact
 - => **HINT:** if **“link to company”** has been set, the blog entry will have also been saved to the contact’s company as **“entered at ‘contact name”**



Category

»select«

»Add tag«

+ Upload file

Blog | New | CRM

bego, 10.05.2017:

Phone

not interested

entered at Hans Wurst

Edit

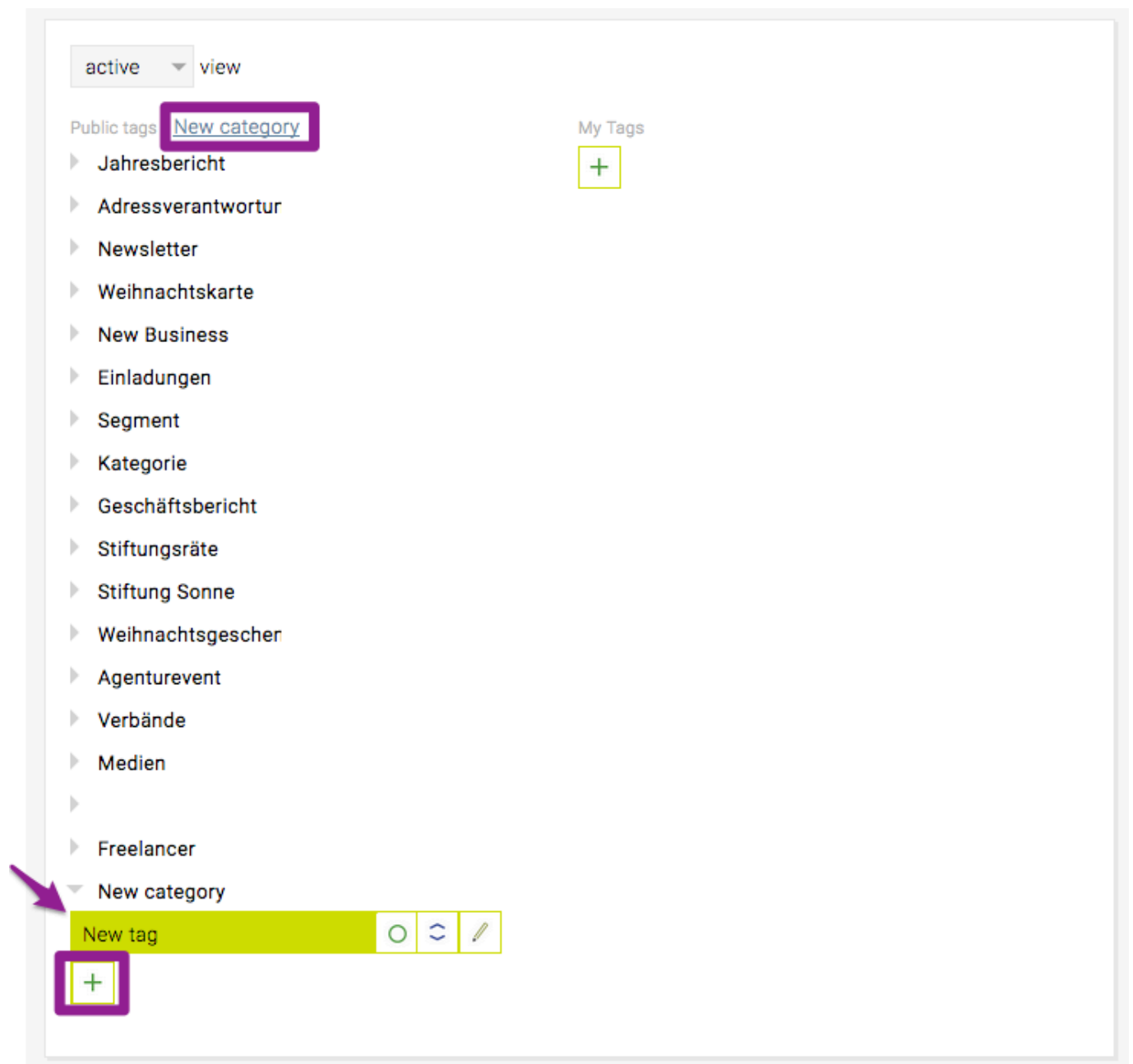
How can I create or edit tags?

General information

- **PLEASE NOTE:** a newly installed **TEAMBOX** does not display any tags in **“Tags”** as these are individual per client and should be custom defined by you/your administrator(s).

Steps

1. Use **“Quick search”** or **“Extended search”** to filter for the contact
 2. Use the menu bar to navigate to **“Tags”**
=> a new page is displayed showing public tags (left) and private tags (right)
 - a. **HINT:** public tags are visible to all users, private tags only to the user who created/assigned the tag
 3. Click ..
 - a. **„New category”** to create a new public tag **OR**
 - b. the green ‘plus’ icon in **„My tags”** to create a new category for a private tag
=> **„New category”** is displayed at the end of the tag list
 4. Click the new category to edit it
 5. Enter a new name for the category and confirm the changes by clicking the green ‘check’ icon
 6. (optional) drag & drop the new category to a different position in the list
 7. Expand the category details by clicking the arrow next to the category name
=> a green ‘plus’ icon is displayed
 8. Click the green ‘plus’ icon
=> **„New tag”** is displayed
 9. Change the tag details (i.e. repeat the **„New category”** steps above) and repeat until all desired all tags have been added
=> the created tags can now be used in contact details > **„Tags”**
-
1. **HINT1:** each tag and category can be edited by double clicking or clicking on the pencil icon
 1. **HINT2:** when editing tag details, click the ‘circle’ icon to deactivate a tag => it will not be displayed in the system any more until it is reactivated



How can I assign/remove a tag to/from a contact?

Steps

1. Use “**Quick search**” or “**Extended search**” to filter for the contact
2. In the displayed contact detail section „**Tags**“, either ...
 - a. select a „**Category**“ from the drop-down and the desired tag to **assign** it to a contact **OR**
 - b. click the ‘minus’ icon for each tag you want to **remove** from this contact
3. => As soon as the tag has been assigned/removed, this change has immediate effect on the system.

How can I transfer address data?

TEAMBOX offers two ways of using address data on devices.

1. **LDAP** requires an active internet connection to request the address data live from the server without transferring it to the device;
2. **CardDAV** transfers the data to the device and saves it locally.

PLEASE NOTE: These are optional features that need to be activated by intevo. Please contact our support for more details.

How can I request address data via LDAP?

General

- LDAP (i.e. Lightweight Directory Access Protocol) provides a simple way to request and use address data such as phone numbers, email addresses etc. from TEAMBOX using your PIM (= Personal Information Manager, e.g. Outlook, Entourage, Apple contacts, Apple mail, iPhone, ...).
- **The requested data is not saved on your device and is always requested in real time, which means that an active internet connection is required for access.**
- **Please note that this is an optional feature that needs to be activated by intevo. Please contact our support for more details.**
- **TEAMBOX hosted on your own server**
 - If you're running TEAMBOX on your own server, **please contact your system administrator for more information.**
- **Apple address book**
 - **Currently only available up until Mac OSX Yosemite 10.10.5**

Settings

The following sample settings are based on a teambox.ch configuration. Please use your TEAMBOX details for your configuration.

PLEASE NOTE:

1. These settings apply for your server if hosted by intevo (SaaS)
2. 'xxx' needs to be replaced by your customer short name

Name: any (e.g. "TEAMBOX")

Server: xxx.teambox.ch (your TEAMBOX URL)

Port: *Standard (389)*

SSL: *yes*

Search area: *o=addressbook,dc=teambox,dc=ch*

Area: *subtree*

Authentication: *simple*

User name: *cn=xxx,dc=people*

Password: specific LDAP password, to be communicated by your admin

Steps – Apple Mail

1. Go to **"System Preferences" > "Internet Accounts"**, scroll down the list to click **"Add Other Account"** and select **"LDAP account"**

2. Use the information in the screenshot to fill in the fields accordingly
3. The username and password are provided by the network administrator
4. After completing the above described steps, Mail automatically uses the configured LDAP account.

Steps – Outlook (Adding a Directory Services (LDAP) Account)

1. Go to **“Extras” > “Accounts”**
2. Click the icon in the bottom-left corner of the window to add a new account and click **“Directory Services Account”**
3. Enter the details for the directory service and click **“Add account”**
4. If required, choose the authentication method after adding the account and/or define the LDAP search options by clicking the option **“Advanced”**

How can I transfer address data via CardDAV?

General

- Using CardDAV means that address data from TEAMBOX can be transferred to CardDAV-friendly devices, such as devices operating with Mac OSX. **Windows clients only support CardDAV in combination with EMClient (email client and calendar software for Windows 7).**
- The addresses are being transferred to the device and are thus also available if the device is offline. **Only original data can be transferred – any changes made to the data on your device are not transferred back to / synced with TEAMBOX.**
- For each user, intevo (in the TEAMBOX basic settings) can define **if only select or all data should be transferred**. Using the default settings will only sync addresses labelled with 'my sticker'.
- To transfer only select addresses, they need to be **labelled accordingly in TEAMBOX using custom stickers**, which in turn will be the new categories in Apple contacts (Mac OSX or iPhone).
- **Please note that this module is subject to a fee – please contact your account manager for more details.**

Steps Mac OSX

1. Open '**System Preferences**', open '**Internet Accounts**' and once the list of internet accounts is displayed, scroll down to the very end to click '**Add Other Account...**'.
2. From the list of options, choose '**CardDAV account**' and specify the required details (i.e. your teambox short username, password and server address in '**username**', '**password**' and '**server address**'). Complete this step.

Steps iPhone

1. To configure CardDAV on your iPhone, go to "**Settings**" > "**Accounts & Passwords**" > "**Add Account**" > "**Other**" > "**Add CardDAV Account**".
2. Specify the same details as above (i.e. TEAMBOX username, password and server). Complete this step.

JOBS

If you are new to TEAMBOX, we recommend looking through the information in the following section:

- [First steps and basic procedures in TEAMBOX](#)
 - [Finding/selecting jobs](#)
 - [Creating jobs](#)

In *this* section, you will find information on the following topics:

- [How do I find or select a job?](#)
- [How do I create a new area?](#)
- [How do I create a job?](#)
- [How can I display what kind of information in the job overview?](#)
- [How can I change pricing on different levels?](#)
- [How can I create a job report?](#)
- [Where can I get a graphical overview of jobs?](#)
 - [Finance cloud](#)
 - [Activity cloud](#)

How do I find or select a job?

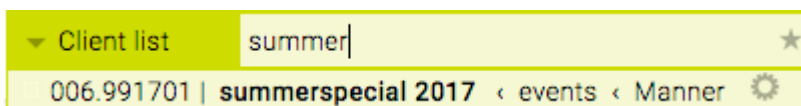
Using the 'job selector'

- Clicking the star icon shows the latest favourites (i.e. the last set of jobs for which services have been recorded)
- You can use the search via keyboard or mouse
- Clicking "**Client list**" will display all available clients
 - Clicking the small arrow to the right of the client name shows all areas created for this client
 - Again, clicking the arrow for one of these areas will display all jobs recorded for this area
 - Clicking one of the now displayed jobs shows the job details within the job overview

Searching within the 'job selector'

- Use the search field to directly locate a specific client, area or job
 - Per default, the search covers all available jobs: entering (a part of) a job title or job number will give you a list of all jobs that contain (a part of) the searched term in their titles
 - Clicking "**Client list**" will change the search to cover all available clients
 - Clicking the arrow to the right of the client name will change the search to cover all available areas

HINT: The background text of the search field always indicates which data is currently being searched for (e.g. "Search (Jobs)")



Filtering and sorting within the 'job selector'

- Click "**Client list**" and then the small cog wheel icon to the right at the bottom; this will display additional filtering and sorting options
 - Click "**active**"/"**all**" to filter for active or all jobs
 - Click "**123**"/"**ABC**" to sort by number or alphabet
 - Click the arrow in the field "**Budget year**" and select the relevant items to filter by budget year
 - Clicking the check box "**Numbers**" will display the client ID (if available)
 - Clicking the check box "**Client names**" will show the long name in addition to the short name

▼ Client list		Search (Clients) ★
54	> Klassik	Social Media Strate...
absm	> video	Redesign Newsletter
Adidas	> <input type="checkbox"/> Online	
Apple	> Broschüren	
BMW_UK	> Homepage	
Caritas	> Fassadenges...	
Colgate	> PR	
Dreamcompa...	> Architektur	
Gruetter	> Consulting	
INTERN	> Online	
KSSG	> events	
<input type="checkbox"/> Manner	>	
mci	>	
◀ active ▶ ABC ▲		◀ active ▶ 123 ▲
◀ active ▶ 123 ▲		
Budget year ▼		<input type="checkbox"/> Numbers <input type="checkbox"/> Client names

How do I create a new area?

To access further information on this topic, please click this link: [How do I create a job?](#)

How do I create a job?

To access further information on this topic, please click this link: [How do I create a job?](#)

How can I display what kind of information in the job overview?

Steps

- In “**Jobs**”, select a job using the job selector
- In the upper part of the job overview, job-related information such as “**Description**” and “**Status**” (the only two mandatory fields) are displayed as well as optional data such as “**Internal person in charge**”, “**Job description**” and more

The screenshot shows the 'Job overview' tab selected in the top navigation bar. Below the navigation bar, the 'Job information' section is displayed. It contains several fields and sections:

- Number:** 006.981703
- Budget year:** 2017
- Status:** Pitch (dropdown menu)
- Phase:** A green box with a '+' icon is next to the Phase label.
- Description:** Social Media Strategy
- Active:** yes
- Created:** 21. Mar 2017
- Start:** (dropdown menu)
- End:** (dropdown menu)
- Internal person in charge:** Reitbauer, Martin (dropdown menu) with an 'active' checkbox.
- External person in charge:** »select« (dropdown menu)
- Job description:** A section with a rich text editor toolbar (bold, italic, underline, list, link, unlink, image, video, etc.) and a large text area below it.

- Underneath the “**Job information**” section you’ll find all relevant **TEAMBOX** data that is related to this job (such as controlling, time tracking entries, activities, invoices, uploads, etc.)
 - All these individual sections can be expanded or collapsed by clicking the triangle left to the name of the section; for each section, the number in brackets indicates the number of already added/created data/documents for this section
 - Clicking the section title will redirect you to the **TEAMBOX** module containing the relevant records; clicking “**Jobs**” in the main navigation bar will redirect you back to the previously displayed job
 - Clicking any of the direct links listed in the individual sections (blue font, underlined on mouseover) opens the related document or data, such as an estimate or an invoice
 - Columns can be hidden/displayed or grouped and rows can be sorted (by clicking the three-line icon which is displayed on mouseover)

Controlling Amounts in CHF

Time tracking entries (1)

Activities (2)

Activity	Status	What	From	Until	Days	% entered
Work package	Offen	Work package		28.03.2017	7	
Work package	Offen	Design		17.05.2017	57	125.00

Estimates

Out of Pocket

Staff expense

Third party invoices

Agency invoices

Advance invoices

Documents

Production request/orders

Calendar

Uploads

Sort Ascending

Sort Descending

Columns

Group By This Field

Show in Groups

“Controlling”

- The section **“Controlling”** provides a concise overview of any related financial data, tracked time and activities
 - Clicking the graph opens an extra window displaying further details
 - In case of a foreign-currency job (i.e. the currency for this job doesn't match the agency's defined currency) the figures are converted to the currency defined for the agency

Controlling Price Amounts in CHF

CHF 0.00 1'300.00 2'600.00 3'900.00 5'200.00 6'500.00 7'800.00 9'100.00 10'400.00 11'700.00 13'000.00

50% 215%

Description	In-house effort	OOP	Expense	Effective income.	EST.
Strategy	3'450.00		3'450.00		
Account Management	3'630.00		3'630.00		1'000.00
Creation					2'300.00
Movie production		5'000.00	5'000.00		
Total	7'080.00	5'000.00	12'080.00	0.00	3'300.00
			-12'080.00		

Time tracking entries (3)

Social Media Strategy

006.301601

Client Area

Manner Online

	Service	EST.	Invoice
In-house effort	7'080.00		
Out of Pocket	5'000.00		
	12'080.00	3'300.00	0.00
Difference		-8'780.00	-12'080.00
Work packages	Finished 1	Open 1	50 %

“Uploads”

- Here you can upload external documents for this job (all formats, such as MS Word or Excel, PDF files and images, ...)
 - Easily upload the document via drag & drop or by clicking **“Upload file”**; multi-select is

possible for drag & drop

- All uploaded documents are displayed in this section and can be downloaded, changed or deleted

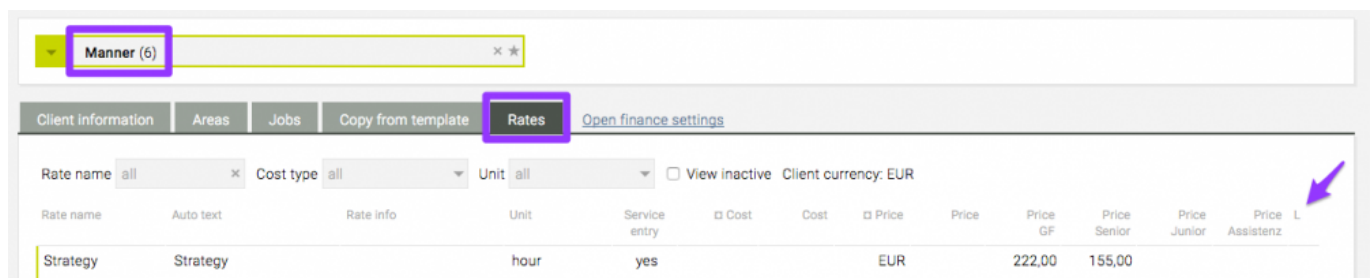
▾ Uploads (2)

Filename	File type	changed by	changed on	Size	Icon
Placement.png	PNG Graphic	Jeannine Vodicka	16.02.2017	123 KB	
KV_1096_Apple.pdf	PDF Document	Jeannine Vodicka	16.02.2017	236 KB	
 Upload file					

How can I change pricing on different levels (client, area, job)?

General information

- Prices can be changed in the tab “**Rates**” for each level (i.e. client, area, job)
- If specific, agency-global rates are not applicable for a certain client, these can be deactivated (per client)
- Rates are inherited from the higher onto the subordinate level
- After choosing a client in the ‘job selector’, the rates for that specific client can be changed in the tab “**Rates**”
- In the final column (“**L**”), a set of letters indicate the level within the hierarchy for which the rate is currently being applied:
 - **A** = agency level
 - **C** = client level
 - **Ar** = area level
 - **(no letter)** = rate applies to the currently selected level







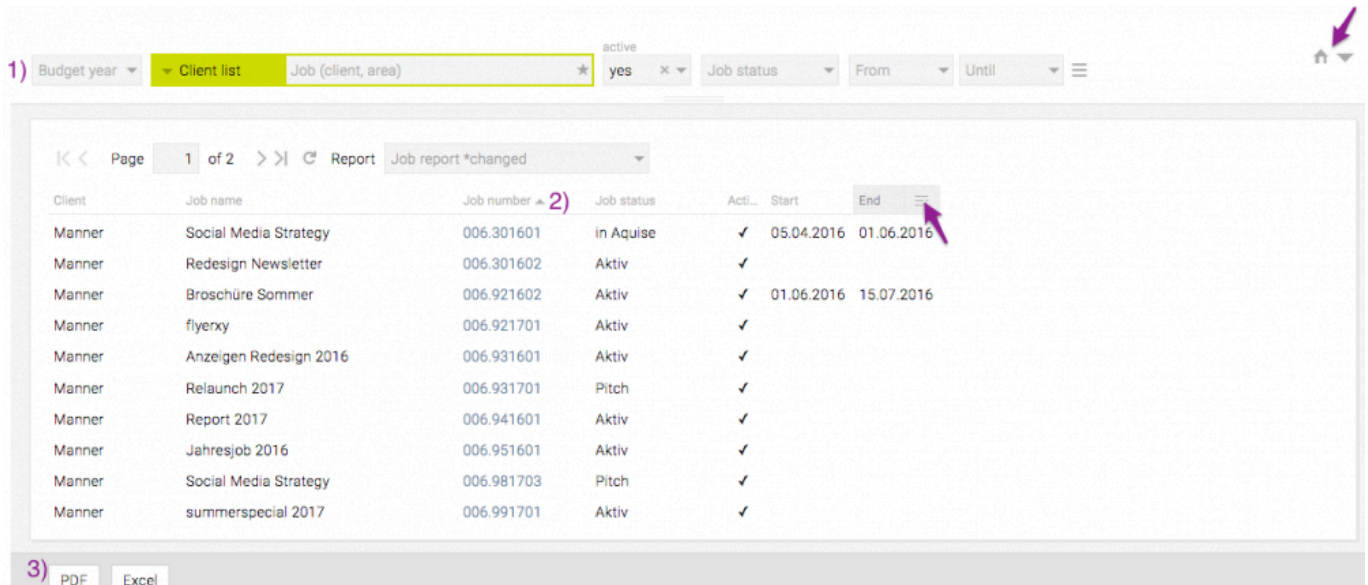
Rate name	Auto text	Rate info	Unit	Service entry	Cost	Price	Price GF	Price Senior	Price Junior	Price Assistenz	Price L
Strategy	Strategy		hour	yes		EUR	222,00	155,00			

HINT: During the **TEAMBOX** initiation phase, the rate and price model is initially defined (i.e. in “**Admin**” > “**Services admin**” > “**Rates**”), but you can adapt this at any time.

How can I create a job report?

General information

- (1) Filter options – use these for general (budget year, area, ..) and advanced filtering (job status, period, creation date, ...)
 - Clicking the icon  will clear all filter settings
 - Clicking  will give you even more filter options
- (2) Click  to sort the list in ascending or descending order
 - Clicking  will display advanced column options
- (3) Clicking the buttons “PDF” or “Excel” at the end of the page will export the job report to each of the formats



The screenshot shows the TEAMBOX interface with a table of jobs. At the top, there are filter options: 'Budget year', 'Client list', and 'Job (client, area)'. A purple arrow points to a house icon in the top right corner, which is used to clear all filter settings. Below the filters, there is a table with columns: Client, Job name, Job number, Job status, Act..., Start, and End. A purple arrow points to a dropdown arrow in the 'End' column header, which is used to sort the list in ascending or descending order. At the bottom of the table, there are buttons for 'PDF' and 'Excel' to export the job report. A purple arrow points to these buttons, which are labeled '3) PDF' and 'Excel'.

Client	Job name	Job number	Job status	Act...	Start	End
Manner	Social Media Strategy	006.301601	in Aquis	✓	05.04.2016	01.06.2016
Manner	Redesign Newsletter	006.301602	Aktiv	✓		
Manner	Broschüre Sommer	006.921602	Aktiv	✓	01.06.2016	15.07.2016
Manner	flyerxy	006.921701	Aktiv	✓		
Manner	Anzeigen Redesign 2016	006.931601	Aktiv	✓		
Manner	Relaunch 2017	006.931701	Pitch	✓		
Manner	Report 2017	006.941601	Aktiv	✓		
Manner	Jahresjob 2016	006.951601	Aktiv	✓		
Manner	Social Media Strategy	006.981703	Pitch	✓		
Manner	summerspecial 2017	006.991701	Aktiv	✓		

Where can I get a graphical overview of active jobs?

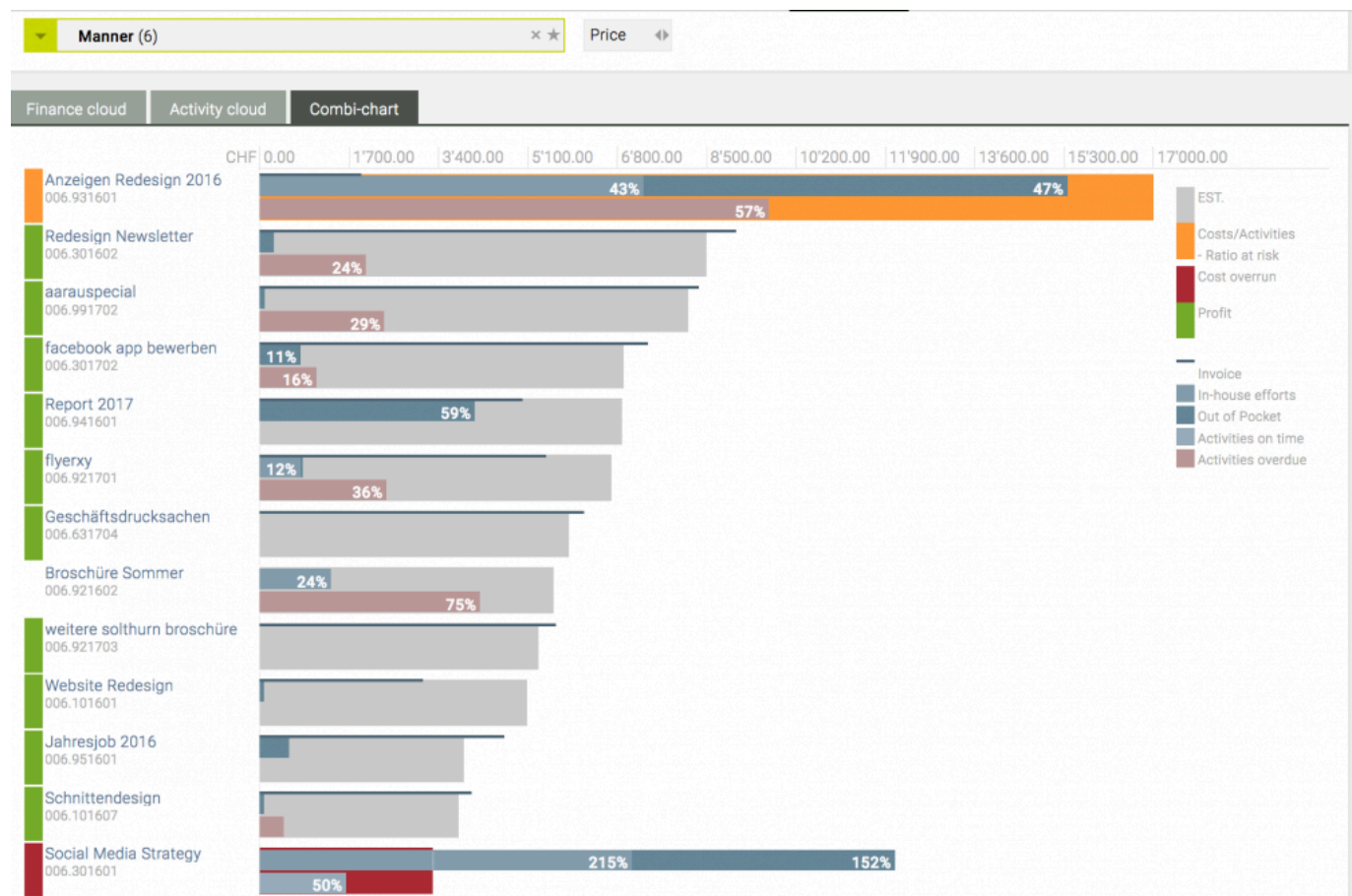
General information

There are three options to visualise progress details for current jobs in “Jobs” > “Job portfolio”:

- [Finance cloud](#)
- [Activity cloud](#)
- Combi-Chart

Combi-Chart

- **Select a client (and, optionally, area)**
 - All active jobs are displayed
 - The large progress bar in the background indicates the combined financial figures (i.e. limit) as set by the estimates – it is either **grey (neutral)**, **orange (to indicate immediate risk)** or **red (if the limits have been exceeded)**
 - Within that bar, three other bars illustrate more details
 - **Top bar**: combined figures of in-house efforts and out-of-pocket invoices (including percentage showing in how far numbers match the approved estimate)
 - **Bottom bar** (if applicable): approximate work progress in terms of planned activities
 - **Thin top line**: already issued agency invoices
- **Colour definitions (left end of each row):**
 - **green**: costs correlate with the approved estimate
 - **orange**: costs are likely to exceed the approved estimate (already accumulated costs exceed 75% of the estimate and are disproportionate to already completed activities)
 - **red**: already accumulated costs have already exceeded the approved estimate OR costs have been generated that do not have a corresponding offer (in the latter case, the warning “Costs without estimate” is displayed on the right)
- **Clicking the bar shows more details**
- **Clicking the job title takes you to the job overview, displaying all the details for that job**
- **HINT:** per default, all recorded staff efforts are displayed as prices. Users with adequate permissions can change this to a “cost view” rather than a “price view”: this will display the difference between approved estimate and costs (i.e. the marginal return) based on the staff costs.

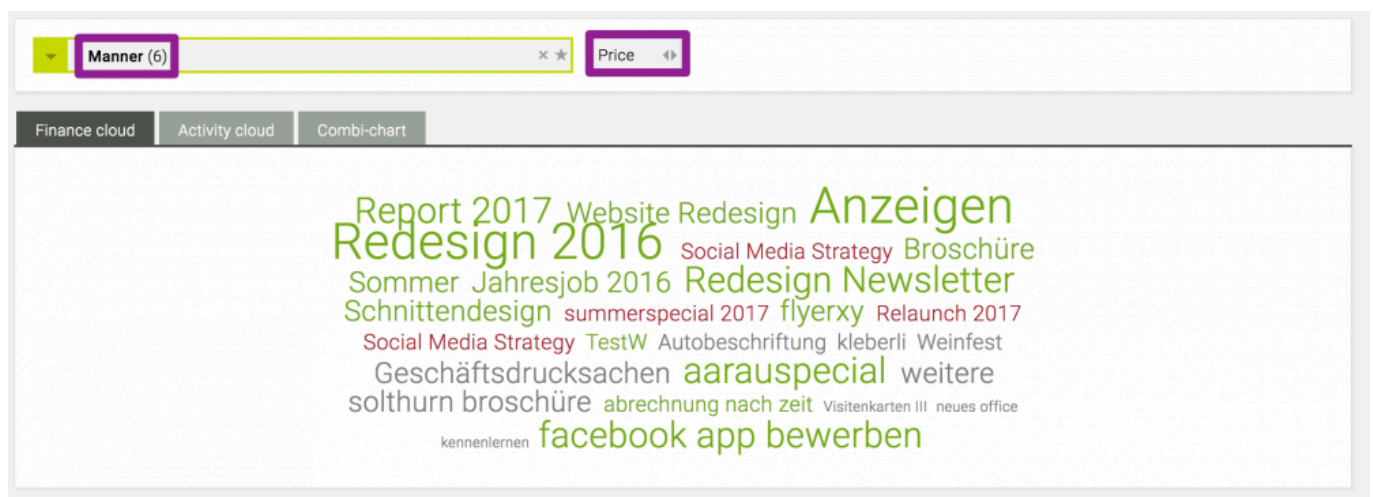


HINT: if project management has not been activated, the combi chart can still be used, showing financial contexts only.

Finance cloud

General information

- Select a client (and, optionally, area)
 - The font sizes correlate with the extent of costs as defined in the approved estimates
 - The font colours correlate with the financial state of the jobs
 - **grey**: no estimate has been approved and/or no efforts have been recorded
 - **green**: recorded efforts are lower than the figures in the approved estimate
 - **red**: approved costs have been exceeded
 - On mouseover, the tooltip displays details on the financial situation for this job

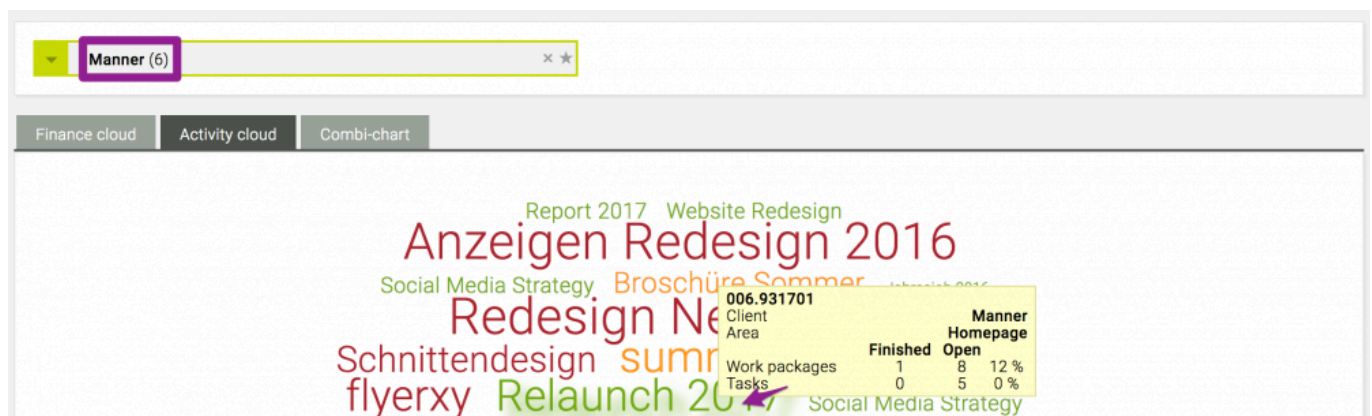


HINT: clicking any of the terms in the cloud (i.e. jobs) will redirect you to the job overview.

Activity cloud

General information

- Select a client (and, optionally, area)
 - The font sizes correlate with the number of planned activities based on the project planning
 - The font colours indicate the following:
 - **green**: no project management activities (i.e. work packages, milestones, tasks) are overdue and everything is going according to plan
 - **orange**: one of the activities related to the job is overdue
 - **red**: several activities related to the job are overdue and the project time frame is at risk
- On mouseover, the tooltip displays information on how many work packages / activities have (not) been completed



TIPP: clicking any of the terms in the cloud (i.e. jobs) will redirect you to the job overview.

How can I migrate data from one job to another?

General information

- **PLEASE NOTE:** the following (financial) data cannot be migrated:
 - *Finalized, exported and EDI invoices cannot be migrated*
 - *Exported and EDI out of pockets cannot be migrated*

Preconditions

- existing job with migratable data

Steps

1. Open an existing job and click the tab **“Migration”**
2. To migrate ...
 - a. all available data, click **“Select all”** AND/OR
 - b. specific data only, select the data type(s) of your choice (e.g. **“Time entries”**), click the radio button **“Single”** and select only those items that you want to migrate using the check boxes
3. At **“Target job”**, use the job selector to choose the target job the data should be moved to
4. Once you're done, click **“Migrate”** at the end of the page
=> The data has been migrated to the specified target job

HINT: a common use case for this feature is to correct incorrectly entered entries (for example, time records that have been entered correctly but recorded for the wrong job)

Manner > Klassik > Website Redesign (006.101601) x ★

Job overview

Advertising Materials

Migration

Rates

[Open finance settings](#)

Modules without any data objects will not be listed

☐ Select all

☒ Requests/orders (2) ☒ all ☐ Single

☐ Time entries (1) ☐ all ☐ Single

☐ Activities (2) ☐ all ☐ Single

☐ Out of Pocket (1) ☐ all ☐ Single

Exported and EDI out of pockets cannot be migrated.

☐ Third party invoices (1) ☐ all ☐ Single

Exported and EDI third party invoices cannot be migrated

☐ Estimates (2) ☐ all ☐ Single

☐ Appointments (1) ☐ all ☐ Single

Target job

☒ Only show active

Manner | 6 ▼

30 | Online ▼

006.301601 | Social Media Sti ▼

Migrate

Back

ACTIVITIES

In this section, you will find information on the following topics:

- [How do I plan an activity?](#)
- [How can I create new phases?](#)
- [How can I copy work packages or move their deadlines?](#)
- [How can I view/filter activities?](#)
- [How do I use the Gantt chart?](#)
- [How can I export activities/gantt data as Excel/PDF file?](#)
- [What information can I see in Resource Plan?](#)
- [How do I track time for an activity from within the activity list?](#)

Definitions

- **activity** = work packages (and their corresponding tasks)

How do I plan an activity?

Please see [First Steps: ACTIVITIES](#) for more information on this topic.

How can I create new phases?

Preconditions

- a previously created or new job

Steps

1. Open the job and navigate to “**Job overview**”
=> “**Phases**” are displayed on the right
2. Click the green ‘plus’ icon, enter the name of the phase and its description (optional) and click the green ‘check’ icon
3. Click “**Save**” at the end of the page
 - a. Scroll down and click the section title “**Activities**” **OR**
 - b. §Alternatively§ go to the module “**Activities**” > “**Activity list**” and use the “Client list” filter to select the job
=> All the phases (and corresponding activities) for this job are displayed

Manner > Klassik > Website Redesign (006.101601) x ★

Job overview | Advertising Materials | Migration | Rates | [Open finance settings](#)

Job information

Number	Budget year	Status	Phase	Description
006.101601	2016	Aktiv	Phase 1	
Description		Active	Created	
Website Redesign		yes	7. Mar 2016	
Start	End			
07.03.2016				
Internal person in charge		External person in charge		

How can I copy work packages or move their deadlines?

Preconditions

- Go to “**Activities**” > “**Activity list**”
- There are existing activities in your system

Steps

Copying via “Current selection”

1. Filter for specific activities and (multi-)select one or several activity/activities in the list
2. Click “**Copy**” at the end of the page
=> “**Copy work package**” window is displayed, “**Current selection**” is shown and preselected work packages are listed
3. Include/exclude specific data (e.g. tasks, milestone markers, ...) using the checkboxes on the left
4. Select a “**Target job**” (“to” line)
5. Finally, click “**OK**”
=> The target job is displayed, including the activities copied in the previous step

Copying “From job”

1. Without preselecting, click “**Copy**” at the end of the page
=> “**Copy work package**” window is displayed, “**From job**” is shown and no work packages are listed
2. Select a specific job from the job selector (in the “**From job**” line)
=> All work packages related to this job are listed for copying
3. Include/exclude specific data (e.g. tasks, milestone markers, ...) using the checkboxes on the left
4. Select a “**Target job**” (“to” line)
5. Finally, click “**OK**”
=> The target job is displayed, including the activities copied in the previous step

Copy work package ×

Current selector ▼

▼ Client list

Source job ★

to

▼ Client list

Target job ★

☒ switch to target job

Copy the following data

☐ Phase
☒ Milestone markers
☒ Attributes
☒ Description
☒ Tasks
☒ Responsibilities
☐ Align time plan to

☐ From first from ▼
☒ Until last to ▼

The following work package will be copied

Work package	
bego	

Cancel

OK

Moving work package deadlines

- (Multi-)select the work packages that you want to change the deadlines for and click **“Move”** at the end of the page
=> **“Move deadline”** window is displayed
- Now you can change the deadline by either selecting
 - “Move by”** (i.e. deadline will be moved to the future according to number of work days / calendar days specified here)
 - “Align time plan to”** => (i.e. shift the start or end dates of the selected activities to a specified date, keeping the originally defined time frame/s)
 - “Uniform dates”** (i.e. all selected work packages will have the same start and/or end dates based on the date(s) defined here)
- Click **“Ok”**
=> The deadlines have been changed according to your choice

Move deadline



1 Activity selected

☐ Move by

+/-

Calendar day

☒ Align time plan to



From

first from



Until

last to



☐ Uniform dates



From

from



Until

until



Please note: the time plan is preserved when multiple activities are moved.


OK

ADDITIONAL INFORMATION

HINT: You can move work packages to other phases via drag & drop.


How can I view/filter activities?

General information

Per default, this page will view work package information based on your previous selection. Clicking the  icon in the filter area will reset all filters to the standard setting (i.e. show all activities from all jobs that you as user are in charge of).

Tenants: If you use tenants, please note that the permissions for tenants in the Admin module may need to be adjusted.

Steps

1. Go to **“Activities” > “Activity list”** and (optionally) expand the list of filter options by clicking the  icon at the top of the page
2. Use the different filtering options
=> The filters will immediately take effect and the activity list will only display the filtered information



Filter options

- **“Phase”**
 - Only show activities from the specified phase(s)
- **“Activity status”**
 - Show all, open or finished activities, or based on their milestone status
- **“Person in charge”**
 - Select the person in charge from the drop-down, add more people the same way and remove them by clicking their name (once the filter has been applied)
- **“Text search”**
 - Show all activities that contain the specified search string
- **“From”, “Until”**
 - Filter by from and due dates
- **“Job status”**
 - Filter by the job status as (custom) defined in your system
- **“Tasks”**
 - Include or exclude any tasks linked to activities
- **“Job person in charge (internal)”**
 - Filter by the internal person responsible for the job (i.e. **“Jobs” > “Job management” >**

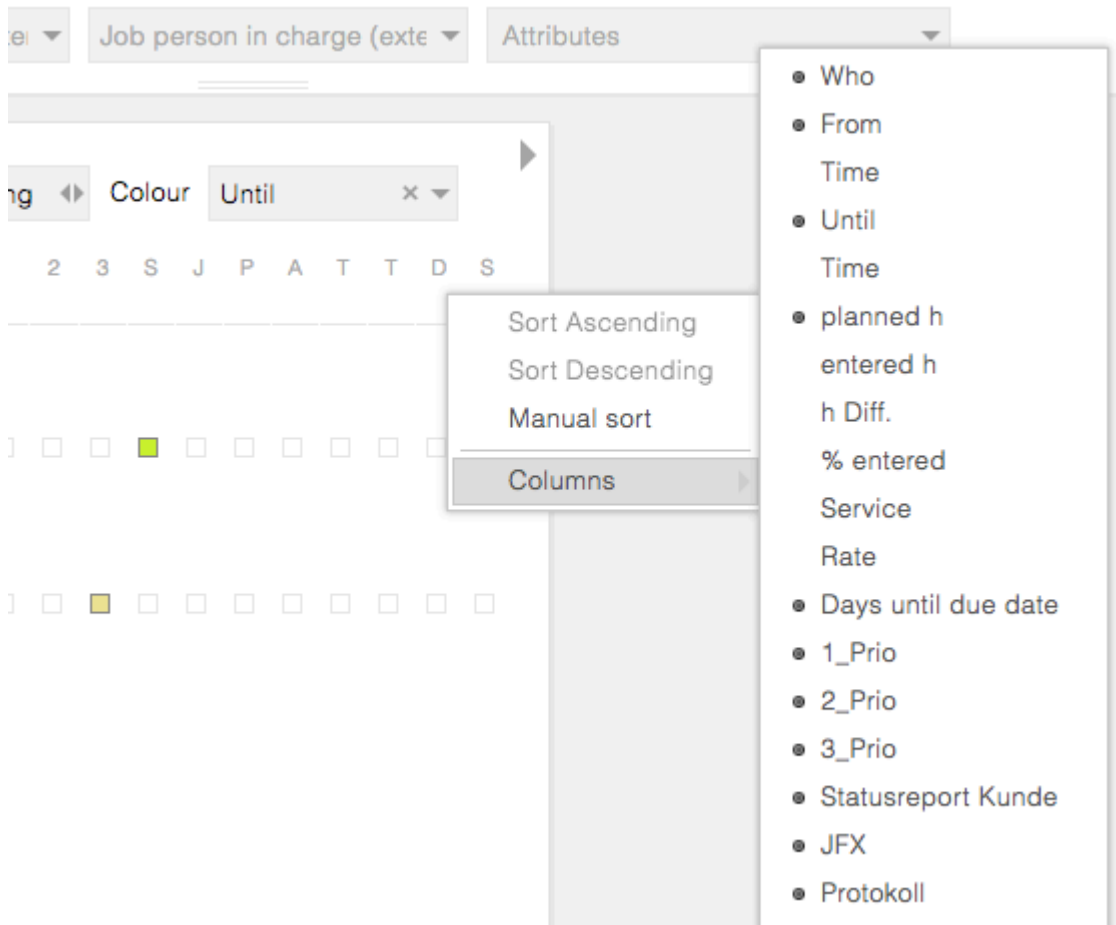
“Job overview” > “Internal person in charge”)

- **“Job person in charge (external)”**

- Filter by the external person responsible for the job (i.e. **“Jobs” > “Job management” > “Job overview” > “External person in charge”**)

- **“Attributes”**

- Filter by the (custom) defined attributes
- **HINT**: you can make these (in)visible by in-/excluding them as a custom column in your view



How do I use the Gantt chart?

Preconditions

- Existing activities

Changing the data in the Gantt chart

1. Filter for the information you want to change (e.g. a work package) to display it in the chart
2. Hover over the bar of your choice and
 - a. click and move the beginning or end of the bar to change the start or end date (i.e. extend/shorten the time period)
 - b. click and move the middle of the bar to move the bar to different start/end dates (i.e. without changing its duration)
=> the data will be changed accordingly

Filtering, grouping and visualising the data in the gantt chart

FILTER

- Generally, filtering options here match the filtering options in “**Activity list**”
- Per default, the Gantt chart will display data as previously filtered in “**Activity list**”

GROUP

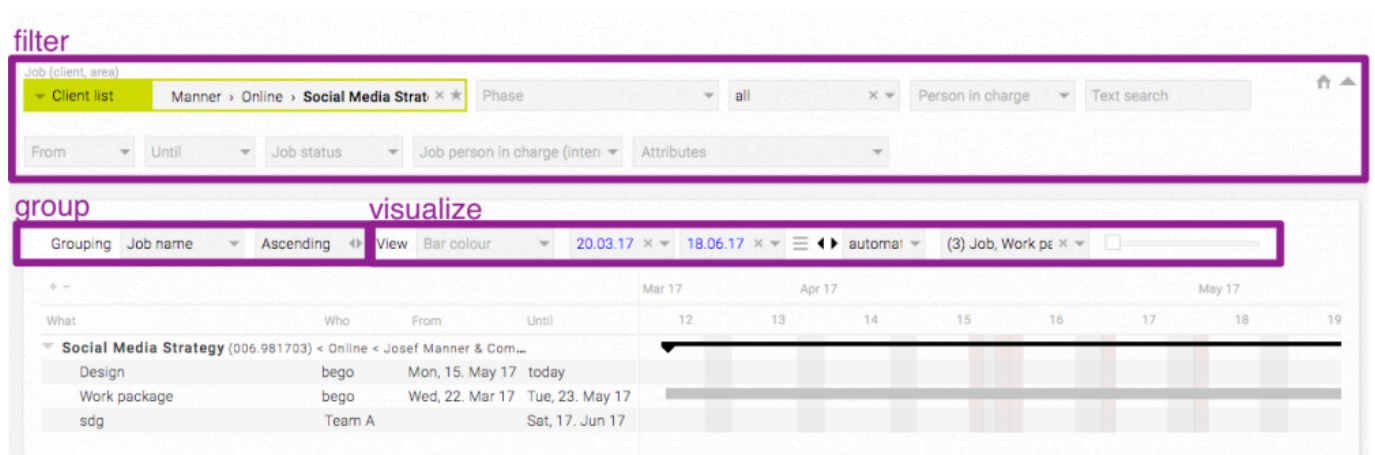
- You can group the displayed data by “**Job name**”, “**Job number**”, “**Client**”, “**WP person in charge**”, “**WP start date**”, “**WP end date**” or not at all
- Switching from “**Ascending**” to “**Descending**” (or vice versa) will sort the data accordingly

VISUALIZE

- “**Bar colour**” – colour the bars according to
 - “**Attribute**” => colour according to the specified attributes (see “Admin” documentation)
 - “**Person in charge**” => colour according to the colours defined for you and your clients to visualize different responsibilities
 - “**Date**” => colour activities differently based on their due dates to highlight immediate, in-time or overdue dates
 - “**Planned h (Avg. Utilization)**” => highlight normal/intense workload
- **Date pickers**
 - Specify the time frame for which data should be displayed (the chart will be compressed/

expanded accordingly)

- **Time intervals**
 - Select **“Days”**, **“Weeks”** or **“Months”** to display the data according to these intervals, or choose **“Automatic”** based on your current data
- **“Visible levels”**
 - Select one or more levels to display the data from this level, i.e. **“Client”**, **“Area”**, **“Job”**, **“Phase”**, **“Work package”** and **“Tasks”**
 - Depending on your selection, the activity information will be indented accordingly
- **Column width slider**
 - Moving the slider to the left/right will compress/expand the displayed column width accordingly



How can I export activities/gantt data as Excel/PDF file?

Preconditions

- existing activities

Steps

1. Go to **“Activities”** > **“Gantt chart”**
2. Filter/group/visualize/change the data according to your needs
3. Click the button **“PDF”** at the bottom of the page
4. Choose the export language and format
5. **(OPTIONAL)** Select **“Replace employee names with AGENTUR”** to make the chart anonymous
=> The generated PDF will be downloaded to your computer

What information can I see in “Resource Plan”?

General information

“**Resource Plan**” gives you a concise overview of your staff’s overall workload. For each employee, all their activities are displayed as clickable links to facilitate changing the activities when resource conflicts arise.

The planned workload is displayed and can be changed in “**Activities**” > “**Activity list**” > **selected activity** > “**planned h**”.

Steps

1. Go to “**Activities**” > “**Resource plan**”
=> for each employee, each cell in their corresponding line is coloured according to their workload and project-related time conflicts – the colour coding can be defined in “**Admin**”
2. Click the small arrow next to an employee’s name to expand their resource planning details:
 - 1): a white number on grey background indicates that for this employee an activity has been scheduled for that day despite them being absent
 - 2): “h” indicates that this employee has already booked more hours for this activity than originally planned
 - 3): “A” indicates that that this person is absent on that day, but that they are part of a planned activity for the day
 - 4): a coloured bar at the beginning of a line indicates overdue activities

HINT: Use the filter options at the top to change the displayed time frame and staff

	M 20	D 21	F 22	S 23	S 24	M 25	D 26	M 27	D 28	F 29	S 30	S 1	M 2	D 3	M 4	D 5	F 6
Beratung																	
▼ Gottschalk, Benjamin																	
Konzept Website		h	h	h			h	h									
Änderungen																2 ⁰⁸	2 ⁰⁸
Hirschbrich, Meret																	
▶ Kern, Lukas																	
▼ Mendl, Markus																	
On Air																	
▶ Peter, Silvia																	
▶ Reitbauer, Martin																	
Tester, Marianne																	
Vodicka, Jeannine																	
Kreation																	
▶ Bauer, Dominik																	
▼ Bauer, Tom																	
Aufnahmen d/f/i		5 ⁰⁰															
Musterarbeitspaket		5 ⁰⁰															
Konzept erstellen		0 ²¹	0 ²¹	0 ²¹			0 ²¹	0 ²¹	0 ²¹	0 ²¹	0 ²¹			0 ²¹	0 ²¹	0 ²¹	0 ²¹
Testaufgabe		0 ³⁵	0 ³⁵	0 ³⁵			0 ³⁵	0 ³⁵	0 ³⁵	0 ³⁵	0 ³⁵			0 ³⁵	0 ³⁵	0 ³⁵	0 ³⁵
Heinrich, Jan																	
▶ Kirchner, Michael																	
▶ Muster, Bernd																	

How do I track time for an activity from within the activity list?

General information

For more information on time tracking see also: [time tracking / work time records](#)

Steps

1. Go to **“Activities“** => **“Activity list“**
2. Choose one of your own activities and mouse-over this activity's line
=> a small clock icon appears (**“Enter time tracking“**)
3. Click the clock icon
4. Enter your time entry details and click **“OK”**
=> The new time entry for this activity has been saved.

The screenshot shows a web application interface with a modal form for time tracking. The modal has a yellow header with a close button (X) and three dropdown menus: '07.07.17', 'Service', and 'Rate'. Below the header is a section labeled 'Information' with a text input field containing '10:00h' and a time selection control showing '00:00'. At the bottom of the modal is an 'OK' button. In the background, a list of activities is visible, with 'Design' selected and highlighted in yellow. To the left of the 'Design' entry is a small clock icon and a plus sign in a green box.

TIME TRACKING

In this section, you will find information on the following topics:

- [How can I track my work hours?](#)
- [How can I finish my day using time tracking?](#)
- [How can I move time tracking entries?](#)
- [How can I evaluate time tracking entries?](#)

How can I track my work hours?

Preconditions

- Depending on your installation, “Attendance” may / may not be displayed here (see first step below)

Steps

“ATTENDANCE”

1. Navigate to **“Time tracking” > “Entry”**
=> **“Attendance”** is displayed at the right side of the page
2. Define the start time of your work at **“Present from”** by either entering the time in the field or adjusting the specified time using the arrows next to it
3. Enter your main break at **“Break from”** and **“Break until”**
4. Define the end time of your work at **“Present until”**
=> Based on your selection, the total hours spent on that day are displayed at the bottom of the fields
HINT: the total might be displayed in red if you haven’t specified a (required) break, worked too many hours than legally covered or based on other issues concerning work legislation; in this case, the system will specify the issue at the bottom of the page (e.g. *“The legally required minimum break has not been taken.”*)

“TIME ENTRIES”

HINT: see also: [first steps: work time records](#)

1. In the middle section of the page (i.e. **“Time tracking”**), track your time entries by
 - a. defining the type of work that was carried out in the upper-most drop-down field (e.g. internal meeting, acquisition, ..)
 - b. linking the entry to an existing job (if applicable)
 - c. adding more details on your work at **“Information”**
 - d. and tracking the time either manually or using the stopwatch feature
2. Save all data by clicking the green ‘check’ icon
=> All entered data is displayed in **“Entered time entries”** (displayed towards the bottom of the page)

Today

☐ No leave

May

2017

Mo

Tu

We

Th

Fr

Sa

Su

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

827 not closed

Today

Legend

Open day

Closed day

Holiday

Selected day

Today

Time tracking

Time tracking on Agency

Client list

Search (Jobs)

*

Information

00:00

✓

Attendance

☒ Present from

08:00

☒ Break from

12:00

Break until

12:30

☐ Further break

Present until

17:30

Attendance total

09:00

Entered time entries

Client	Area	Job number	Job name	Service	Information	Item	hh:mm
Aaronson	Snackable Content ...	005.031601	Network Cloudified Net...	Intern			2:00
Total							2:00

Add

Close

How can I finish my day using time tracking?

Preconditions

- existing time tracking records for the day that needs to be completed

Steps

1. All entered data is displayed in **“Entered time entries”** (displayed towards the bottom of the page)
2. Check all data and click **“Close”** at the bottom of the page
=> Time tracking for this day has been completed, the calendar colour for this day changes from orange (i.e. “open day”) to grey (i.e. “closed day”)

HINT: depending on the user's rights, he/she may or may not be able to change the time entries once the above steps have been performed

How can I move time tracking entries?

Preconditions

- depending on the user's permissions, he/she may or may not be able to move existing records

Steps

1. Select the relevant time entry at **"Time tracking" > "Entered time entries"**
2. Click **"Move"** at the bottom of the page
=> **"Move time entry to next day"** pops up
3. Select the day you want to move the entries to by clicking the relevant date in the calendar
4. Click **"OK"** to perform the move
=> The moved entry will now show up as an entered time entry for the previously selected date

How can I evaluate time tracking entries?

Preconditions

- existing time tracking records in your system

Steps

- Go to **"Time tracking" > "Report (BETA)"**
- Filter for a client, area, job, employee, ... to display all time tracking related figures

HINT: the filter options here are similar to the [activity filter options](#)

- For example, set **"Grouping"** to **"Employee"** and filter for a specific employee using the **"Employees"** text field
 => All time tracking entries for this specific employee are displayed (scroll to the left end of the screen to see all columns or remove individual columns)
 => The subtotal for the most relevant figures (e.g. hours spent, price and cost) are displayed at the bottom of the list

Client list	Job (client, area) *	Budget year	Employees	Peter, Silvia (sipe)	x	From	Until		
Info text	Services	Job status	Job person in charge (inten	Billed	Rate				

Grouping	Employee	Subtotal	No subtotal	Only the first 250 time entries are displayed. Change your filter criteria to display more.					
Employee	Service	Date	hours	Item	Price/h	Price	Cost/h	Cost	
▼ Peter, Silvia			757:41	12		144'260.20		53'877.85	
	Internal Meetings	10.11.2014	0:30		150.00	75.00	70.00	35.00	
	Education	12.11.2014	4:00		150.00	600.00	70.00	280.00	
	Education	18.02.2015	2:00		150.00	300.00	70.00	140.00	
	Education	17.04.2015	0:45		150.00	112.50	70.00	52.50	
	Internal Meetings	11.06.2015	0:30		150.00	75.00	70.00	35.00	
	Internal Meetings	21.07.2015	0:30		150.00	75.00	70.00	35.00	
Total			757:41	12		144'260.20		53'877.85	

Page 1 of 1

Refresh PDF Excel

FINANCES

In this section, you will find information on the following topics:

- [Estimates](#)
 - [How can I search estimates?](#)
 - [How do I create a new offer?](#)
 - [How can I create a copy of an estimate?](#)
- [Incoming invoices](#)
 - [How can I look for an incoming invoice?](#)
 - [How do I create a new incoming invoice?](#)
 - [How can I create an OOP invoice?](#)
 - [How can I create a third-party invoice?](#)
- [Outgoing invoices](#)
 - [How can I look for an outgoing invoice?](#)
 - [How do I create a new outgoing invoice?](#)
 - [How can I create an advance invoice?](#)
 - [How can I cancel an invoice?](#)
 - [How can I create a collective invoice?](#)
 - [Collective invoice as PDF](#)
- [Controlling](#)
 - [How does 'Controlling' work?](#)
- [Settings](#)
 - [How can I define general financial settings?](#)
 - [What kind of billing types are there?](#)

Estimates

- [How can I search estimates?](#)
- [How do I create a new offer?](#)
- [How can I create a copy of an estimate?](#)
- [How can I confirm an estimate?](#)
- [How do I create a template for estimates?](#)
- [How do collective estimates work?](#)

When creating estimates, you can use text blocks for reoccurring text elements.

Click here to get more tips on how to create text blocks: [HINT text blocks](#)

How can I search estimates?

General information

- Go to **“Finances” > “Estimate”**
- In **“Budget Year / Client / Area / Job”**, you can filter estimates by these categories
- If you filter for the client **“AGENTUR”** and click **“Search”** at the bottom of the page, all estimates linked to your agency are displayed
- Clicking one line in the results list or the version name/number on the left (i.e. none of the links on the right side in the list) will display the corresponding estimate
- Clicking the **“Job number”** or **“Job name”** will display all estimates linked to that job only
- Clicking **“PDF”** or **“Excel”** at the bottom of the page will display the search results in a separate PDF/Excel document

Budget year/client/area/job
 2017 ▼ Agentur | 999 ▼ »no entry« ▼ »no entry« ▼ [select](#)
☒ Only show active

Text search

Version Number Period From Until Status

31 records found (15 shown at the same time)
[1..15](#) | [16..30](#) | [31](#)

Version	Number	Status	Date ▼	Employee	□	Amount	Client	Area	Job number	Job name
1	1190	unapproved	1. Feb 2017	Martin Reitbauer	CHF	3'975.00	Manner	Online	006.981702	schmiede
2 minus 5%	1191	approved	1. Feb 2017	Martin Reitbauer	CHF	3'821.25	Manner	Online	006.981702	schmiede
1	1184	finalized	31. Jan 2017	Martin Reitbauer	CHF	7'050.00	Manner	Broschüren	006.921701	flyerxy
2	1185	approved	31. Jan 2017	Martin Reitbauer	CHF	6'697.50	Manner	Broschüren	006.921701	flyerxy
1	1182	finalized	30. Jan 2017	Martin Reitbauer	CHF	8'250.00	Manner	Online	006.981701	Banner
2	1183	approved	30. Jan 2017	Martin Reitbauer	CHF	7'882.50	Manner	Online	006.981701	Banner
1	1180	unapproved	27. Jan 2017	Bernd Muster	CHF	3'280.00	Adidas	Online	059.301701	Website Langnau
2	1181	billed	27. Jan 2017	Bernd Muster	CHF	2'880.00	Adidas	Online	059.301701	Website Langnau
1	1179	billed	26. Jan 2017	Bernd Muster	CHF	1'780.00	Adidas	BTL	059.201701	Folder Basel
3	1178	finalized	24. Jan 2017	Silvia Peter	CHF	51.50	Apple	iPad	203.021701	Easter Promotion
1	1176	unapproved	9. Jan 2017	Silvia Peter	CHF	7'210.00	Apple	iPhone	203.011701	Steuererklärung 2016
2 mit extra	1177	billed	9. Jan 2017	Silvia Peter	CHF	9'480.00	Apple	iPhone	203.011701	Steuererklärung 2016
15. Dec 2016	Silvia Peter	CHF	25'660.00	Apple	iPad	203.021701	Easter Promotion			

[Search](#) [Reset](#) [PDF](#) [Excel](#)

How do I create a new offer?

For instructions on how to create a new offer, please go to: [How do I create a new offer?](#)

How can I create a copy of an estimate?

General information

Creating a copy of an estimate = copying all positions of an existing estimate into a *new* estimate

Preconditions

- Already existing estimate

Steps

1. Open an already existing estimate and click **“Copy”** (bottom of the page)

Selected job
2017 › [Josef Manner & Comp AG](#) › [30 | Online](#) › 006.301701 | Relaunch 2017 [change](#) | [Open in job module](#)

[Back to list](#) ☐ save as template

Name	Version	Receiver
Kostenvoranschlag	1	Josef Manner & Comp AG
Number	Status	Hernalser Hauptstraße 32
1197	finalized	1170 Wien
Date	Specification	Österreich
13. Mar 2017		

Description

Cost type	Text	VAT	AS	Calculation	Price CHF
Programming	10 Personentage Programmierung à 1'500.00	8.00 %	yes	10 days	15'000.00
				Programming	
	Total excl. VAT				15'000.00
	VAT				1'200.00
	Total incl. VAT				16'200.00

▼ Summary

Cost groups	Price	Cost types	Price	Rates	Price
Internal service	15'000.00	Programming	15'000.00	Programming	15'000.00

Comments
Autorkorrekturen werden nach Aufwand verrechnet.

Approved Unapproved PDF Edit **Copy**

2. Now, with **“Estimate”** as selected target, use the filtering options to specify the target job for your duplicate (i.e. which client, area and job) and click **“Select”**
 - a. You can only create duplicates for targets that already exist *and* are active
 - b. Optionally, you can also turn the estimate into a new invoice when choosing **“Invoice”** in the previous step (i.e. at **“Select target for the copy process”**)

Select target for the copy process

☒ Estimate
☐ Invoice

Selected job

2017 ▼ Manner | 6 ▼ 30 | Online ▼ »no entry« ▼ [select](#)

☒ Only show active

Please select a job for the estimate copy.

Cancel

3. Now, the temporary copy (so there is no copied record yet) of the estimate is displayed in the selected target job
 - a. If needed, all details can now be changed
4. Finally, click **“Save”** to create the actual copy

How can I confirm an estimate?

Preconditions

1. A valid cost estimate has been created and assigned to you
2. The new cost estimate shows up as a message in your notifications OR can be found in **“Finances” > “Estimate”** by filtering for estimates with **“Status” “submitted”**

Steps

1. Click the (link of the) estimate
2. From the buttons displayed at the bottom of the page, click **“Confirm”** and then **“Ok”**
=> The issuer of the cost estimate will be notified that the estimate has been confirmed

How do I create a template for estimates?

Steps

1. Go to **“Finances”** > **“Estimates”** and open any job
2. Click the link **“new estimate”** at the end of the list
3. In the estimate, click the check box **“save as template”**
=> Additional options are being displayed
4. Check/Uncheck the check box **“only for this client”** to define the scope of the template
5. Enter a name for this template in **“Description”** and click the *‘check’* icon
=> The new template has been saved
6. Go back to the list of estimates and click the drop-down **>>from template<<** at the end of the list
=> Your newly created template should show up in this list

Selected job

2018 › [Apple](#) › [2 iPad](#) › 203.021805 | iPad 5 [change](#) | [Job link](#)

[Back to list](#)

☒ save as template

☒ only for this client

Description



How do collective estimates work?

General info

- Collective estimates (i.e. a summary PDF print + overall calculated sum of several specified cost estimates) can only be created for estimates that are part of *the same area*

Steps

1. Go to **“Finances” > “Estimates”** and view the desired estimates for the specific area
=> A list of all relevant cost estimates is displayed
2. Click the check boxes in the first column to select all estimates that should be printed collectively
3. Once you are happy with your selection, un/check additional printing options (i.e. **“with Header/Footer”**, **“with VAT”**) and click **“Gang print run”**
=> A summary PDF invoice listing all selected estimates, featuring an overview of all estimates (at the beginning of the document) and an overall sum (at the end of the document) has been created

Incoming invoice

- [How can I look for an incoming invoice?](#)
- [How do I create a new incoming invoice?](#)
 - [How can I create an OOP Invoice?](#)
 - [How can I create a third-party invoice?](#)
- [How can I change the status of an incoming invoice to “paid”?](#)
- [How can I bill an OOP manually?](#)

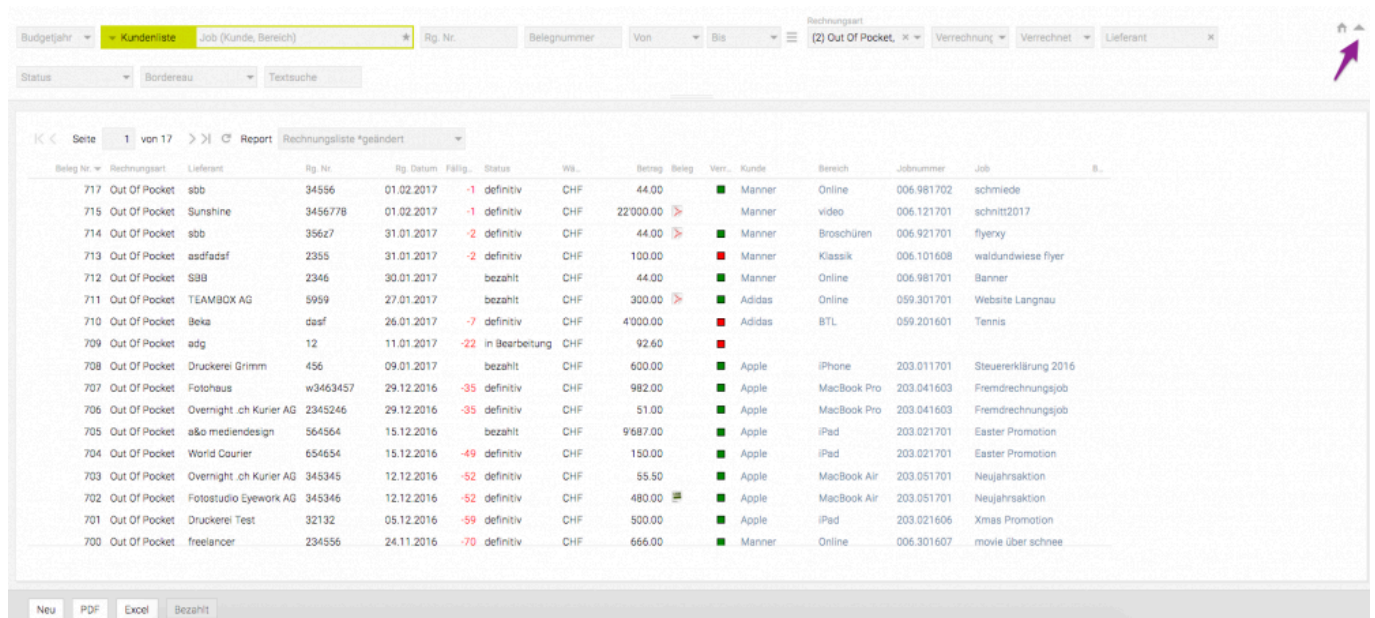
When creating incoming invoices, you can use text blocks for reoccurring text elements.

Click here to get more tips on how to create text blocks: [HINT text blocks](#)

How can I look for an incoming invoice?

Steps

1. Go to **“Finances” > “Incoming invoice”**
2. Using the search field, you can look for **“Budget year”, “Client”, “Area”** and **“Job”**
3. Additionally, you can narrow down your search: click the ▼ icon at the end of the filtering line to show more filtering options
4. Alternatively, click the 🏠 to clear your search settings
5. Clicking the buttons **“PDF”** or **“Excel”** at the bottom of the page will export the search results as PDF or Excel file



Beleg Nr.	Rechnungsart	Lieferant	Rg. Nr.	Rg. Datum	Fällg.	Status	Wk.	Betrag	Beleg	Vorr.	Kunde	Bereich	Jobnummer	Job	B.
717	Out Of Pocket	sbb	34556	01.02.2017	-1	definitiv	CHF	44.00		■	Manner	Online	006.981702	schmiede	
715	Out Of Pocket	Sunshine	3456778	01.02.2017	-1	definitiv	CHF	22'000.00		■	Manner	video	006.121701	schnitt2017	
714	Out Of Pocket	sbb	356z7	31.01.2017	-2	definitiv	CHF	44.00		■	Manner	Broschüren	006.921701	flyerxy	
713	Out Of Pocket	asdfsdf	2355	31.01.2017	-2	definitiv	CHF	100.00		■	Manner	Klassik	006.101608	waldundwiese flyer	
712	Out Of Pocket	SBB	2346	30.01.2017		bezahlt	CHF	44.00		■	Manner	Online	006.981701	Banner	
711	Out Of Pocket	TEAMBOX AG	5959	27.01.2017		bezahlt	CHF	300.00		■	Adidas	Online	059.301701	Website Langnau	
710	Out Of Pocket	Beka	dasf	26.01.2017	-7	definitiv	CHF	4'000.00		■	Adidas	BTL	059.201601	Tennis	
709	Out Of Pocket	adg	12	11.01.2017	-22	in Bearbeitung	CHF	92.60		■					
708	Out Of Pocket	Druckerei Grimm	456	09.01.2017		bezahlt	CHF	600.00		■	Apple	iPhone	203.011701	Steuererklärung 2016	
707	Out Of Pocket	Fotohaus	w3463457	29.12.2016	-35	definitiv	CHF	982.00		■	Apple	MacBook Pro	203.041603	Fremdrechnungsjob	
706	Out Of Pocket	Overnight.ch Kurier AG	2345246	29.12.2016	-35	definitiv	CHF	51.00		■	Apple	MacBook Pro	203.041603	Fremdrechnungsjob	
705	Out Of Pocket	a&o mediendesign	564564	15.12.2016		bezahlt	CHF	9'687.00		■	Apple	iPad	203.021701	Easter Promotion	
704	Out Of Pocket	World Courier	654654	15.12.2016	-49	definitiv	CHF	150.00		■	Apple	iPad	203.021701	Easter Promotion	
703	Out Of Pocket	Overnight.ch Kurier AG	345345	12.12.2016	-52	definitiv	CHF	55.50		■	Apple	MacBook Air	203.051701	Neujahrsaktion	
702	Out Of Pocket	Fotostudio Eyework AG	345346	12.12.2016	-52	definitiv	CHF	480.00		■	Apple	MacBook Air	203.051701	Neujahrsaktion	
701	Out Of Pocket	Druckerei Test	32132	05.12.2016	-59	definitiv	CHF	500.00		■	Apple	iPad	203.021606	Xmas Promotion	
700	Out Of Pocket	freelancer	234556	24.11.2016	-70	definitiv	CHF	666.00		■	Manner	Online	006.301607	movie über schnee	

How do I create a new incoming invoice?

For instructions on how to create a new incoming invoice, please go to: [How do I create a new incoming invoice?](#)

How can I create an OOP Invoice?

General information

Use “**Out Of Pocket (OOP)**” invoicing for cases in which the agency first pays the services provided by a supplier out of its own pocket and then charges the client for that as part of the agency’s invoice.

Steps

1. Go to “**Finances**” > “**Incoming Invoice**”
2. Use the filtering options to select the relevant job the OOP invoice should be connected with
3. Next, you can either (1) click the button “**New**” at the end of the page or (2) **drag and drop** an invoice (such as a scanned copy of a receipt) onto the page to create a new OOP
=> A new window is opened in which you can specify several details:
 - a. “**Supplier**”
 - b. **HINT:** you can quickly add a new supplier by clicking the green plus in the supplier text field) and “**Invoice number**” are mandatory
4. Select “**Out of Pocket**” from the drop-down “**Invoice type**”
5. The field “**Payment target**” automatically displays the payment target in number of days (in case this was specified when adding the company address)
6. You can add costs for different jobs within the OOP, which will then be billed as part of each of the respective jobs
7. Finally, click “**Save**”

Out of Pocket - new

Invoice type

1) Out of Pocket

Supplier

Payment reference

Comment

Billing

Invoice number

Account/IBAN

Exchange rate

04.08.2015

Bookkeeping export

☒

Invoice date

21.03.17

Payment target (Tue, 04.04.2017)

2) 14 Days

Currency

CHF

Original document

☐ Upload file

4)

Cancel

Save

Finalized

Choosing the right option for “Billing”

The drop-down “Billing” offers you several options:

direct

Creating a “direct” OOP means adding the OOP (including the position’s text) as an individual, independent position. Back in the agency’s invoice, this data (i.e. the text and figures) can be changed as needed.

HINT: This option should be used when there was no estimate prior to the OOP or if this position had not been considered in the original estimate.

indirect

Creating an “indirect” OOP means the OOP is not added as separate position; however, once the agency’s invoice is being billed, the OOP is assigned to it as billed within the agency’s invoice.

HINT: This option should be used if this position had already been considered in the original estimate and if the estimate is applied to the agency’s invoice (to avoid duplicate positions in the final invoice). Before the invoice is finalised, you can review the data to see if the numbers from the estimate and the OOP match. Additionally, the OOP is connected to the agency invoice and it is clearly indicated that the client has been billed with the OOP.

none

Choosing “none” means that the client can or should not be charged for the OOP. However, the figures are transferred to and displayed in controlling as expense.

Out of Pocket - new

Invoice type: Out of Pocket

Supplier: + x

Payment reference:

Comment:

Billing: direct, indirect, none

Bookkeeping export: ☒

Invoice date: 21.03.17

Payment target (Tue, 04.04.2017): 14 Days

Exchange rate: 04.08.2015

Currency: CHF

Original document: + Upload file

Cost type	Text	Job	VAT	Net amount	Gross Amount
Strategy		Manner > Online > Social Media Strategy (006.301601)	8.00%	92.60	100.00
				92.60	100.00

+

Cancel Save Finalized

How can I create a third-party invoice?

General information

Usually, a third-party invoice is created if the agency offers the services provided by a supplier as part of an estimate, but if the client pays the supplier him-/herself. Subsequently, the third-party service and cost is not included in the agency's invoice.

Preconditions

- In **"Finances" > "Settings"**: **"Billing type"** (click [here](#) for more details) is set to **"Client pays third party invoices directly"** or **"Client pays third party invoices via agency"**

Steps

1. Go to **"Finances" > "Incoming Invoice"**
2. Use the filtering options to select the relevant job the third party invoice should be connected with
3. Next, you can either **(1) click the button "New"** at the end of the page or **(2) drag and drop** an invoice (such as a scanned copy of a receipt) onto the page to create a new incoming invoice
4. A new window is opened in which you can specify several details:
 - a. **"Supplier"** (**HINT**: you can quickly add a new supplier by clicking the green plus icon in the supplier text field) and **"Invoice number"** are mandatory
5. **(1)** Select **"Third party invoice"** from the drop-down **"Invoice type"**
6. **(2)** At the bottom of the page, specify **"Cost type"**, **"Job"** and the **"Net amount"**
7. **(3)** Finally, click **"Save"**

Third party invoice - new

Invoice type

1) Third party invoice

Client

Supplier

Invoice number

Invoice date

21.03.17

Comment

Exchange rate

04.08.2015

Currency

CHF

Original document

+ Upload file

Cost type	Text	Job	VAT	Net amount	Gross Amount
2) Strategy		Manner > Online > Social Media Strategy (006.301601)	8.00%	92.60	100.00
				92.60	100.00

+ Add new

3)

Cancel

Save

Finalized

How can I change the status of an incoming invoice to “paid”?

Steps

1. Go to “**Finances**” > “**Incoming invoices**” and search/filter for the desired invoice
=> **HINT:** For example, expand the detailed filter options and filter for all invoices with the “**Status**” “**finalized**”
2. From the list, click the incoming invoice to highlight it and click the “**Payment**” button at the end of the page
=> **HINT:** To select several invoices at the same time, use the ‘*Shift*’ (i.e. to select multiple neighbouring lines) or ‘*CTRL/cmd*’ key (i.e. to select individual lines)
3. If necessary, change “**Payment date**” according to your invoice and/or click “**Ok**”

How can I bill an OOP manually?

Preconditions

- **HINT**: This option is only available for 'Out of Pocket' invoices with the following status: **"Billed"**
"open"* _and_ *"Status" "paid"

Steps

1. Go to **"Finances" > "Incoming invoice"** and filter for any relevant OOP
2. Double-click the relevant line from the list
3. At the bottom of the page, click **"manually bill"** (BEN: es sollte "Bill manually" heißen in der TEAMBOX, mit einem capital B!)
4. From the drop-down, select the relevant **"Invoice"**; optionally, change **"Amount"** or **"Comment"**
5. Click **"Ok"** to confirm this action
=> The OOP has been billed manually and the **"Billed"** status in the overview list changes to **"Billed"** (= green square)

Outgoing invoice

- [How can I look for an outgoing invoice?](#)
- [How do I create a new outgoing invoice?](#)
- [How can I create an advance invoice?](#)
- [How can I cancel an invoice?](#)
- [How can I create a collective invoice?](#)
 - [Collective invoice as PDF](#)
- [How can I approve an outgoing invoice?](#)
- [How can I manually bill an outgoing invoice?](#)

When creating outgoing invoices, you can use text blocks for reoccurring text elements.

Click here to get more tips on how to create text blocks: [HINT text blocks](#)

How can I look for an outgoing invoice?

Steps

1. Go to **“Finances”** > **“Outgoing invoice”**
2. Use the filter options to narrow down your search (specifying criteria such as **“Budget year”**, **“Client”**, **“Area”** and/or **“Job”**)
 - a. Below the usual filter options, you will find additional filters to further narrow your search
3. To display the agency's invoices, select **“AGENTUR”** from the client drop-down and click **“select”** (next to the filters) or **“Search”** (at the bottom of the page)
4. Clicking **“PDF”** or **“Excel”** will export the search results as PDF or Excel file

Selected job

2017

Agentur | 999

»no entry«

»no entry«

select

☒ Only show active

Text search

Invoice type

Entry number

Date

Amount

»all invoices«

From

Until

Supplier

Invoice number

Receiver

Status

Billing

Export status

»alle«

19 records found (15 shown at the same time)

☒ Net
 ☐ Gross

1..15 | 16..19

Supplier/text	Invoice type	Date	D	Number	C	Amount	Status	Client	Area	Job number	Job name	Document
TEAMBOX AG	910 Agency invoice	17. Mar 2017	26	895	CHF	19'970.20	finalized	Colgate	Projekte	220.101701	Frühlingskampagne	
TEAMBOX AG	909 Agency invoice	15. Mar 2017	24	893	CHF	19'162.00	finalized	Apple	MacBook Air	203.051703	Easter Promotion	
TEAMBOX AG	908 Agency invoice	13. Mar 2017	2	892	CHF	9'780.00	finalized	Manner	Online	006.301701	Relaunch 2017	
TEAMBOX AG	907 Agency invoice			N/A	CHF	2'060.00	in progress	Apple	iPad	203.021701	Easter Promotion	
TEAMBOX AG	906 Agency invoice	1. Mar 2017	10	891	CHF	618.00	finalized	Apple	iPad	203.021701	Easter Promotion	
TEAMBOX AG	905 Agency invoice	20. Feb 2017	1	890	CHF	1'780.00	finalized	Manner	Homepage	006.931701	Relaunch 2017	
TEAMBOX AG	904 Agency invoice	1. Feb 2017	bez.	889	CHF	3'040.65	paid	Manner	Online	006.981702	schmiede	
TEAMBOX AG	903 Agency invoice	1. Feb 2017	bez.	887	CHF	3'690.00	paid	Apple	Event	203.141701	Einladung	
TEAMBOX AG	902 Agency invoice	1. Feb 2017	-18	886	CHF	55'432.50	finalized	Manner	video	006.121701	schnitt2017	
TEAMBOX AG	901 Agency invoice	31. Jan 2017	-10	885	CHF	5'449.50	finalized	Manner	Broschüren	006.021701	flyer...	
TEAMBOX AG	900 Agency invoice	30. Jan 2017	-20	884	CHF	5'780.10	finalized	Manner	Online	006.981701	Banner	

Search

Reset

PDF

Excel

How do I create a new outgoing invoice?

Click here for detailed instructions: [How do I create a new outgoing invoice?](#)

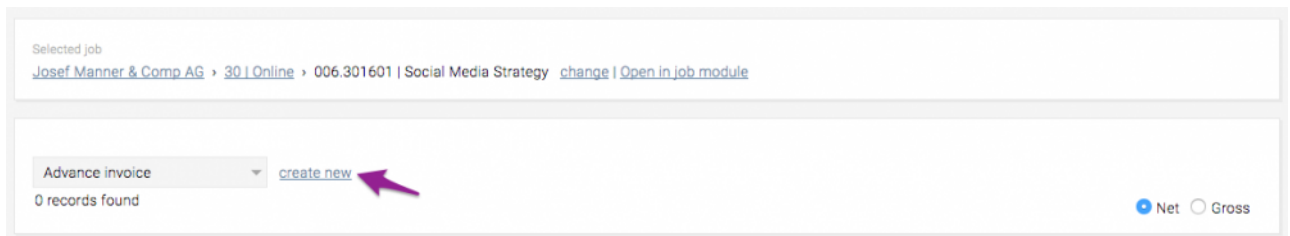
How can I create an advance invoice?

Preconditions

- a previously created job

Steps

1. Go to **“Finances”** > **“Outgoing Invoice”**
2. Select a job and filter the results by **“Budget year”**, **“Client”**, **“Area”** and **“Job”** and click **“select”**
3. Choose **“Advance invoice”** from the drop-down that is now displayed and click the link **“create new”** next to it



4. Most of the fields already contain data which can still be edited
5. Clicking the green 'plus' at the bottom of the page creates a new position; clicking the green 'check' icon after supplying the necessary data will save the position
6. To finish creating the advance invoice, click the button **“Save”** at the bottom of the page

HINT: Advance invoices do not, as opposed to agency invoices, affect income figures. Therefore, in controlling, any figures related to an advance invoice will only show up in the column **“Advance balance”** and not as part of the income. When finalising an agency invoice, the “advance” (i.e. cash discount) can be transferred in the final calculations.

Advance invoice

in progress

Name

Rechnung

Invoice number

N/A

Invoice date (Tue, 21.03.2017)

»Actual date«

Service provision (Tue, 07.03.2017)

»14 Days before invoice date

Period

☒ »automatic«

Payment target (Thu, 20.04.2017)

30 Days

Specification

Receiver

Josef Manner & Comp AG

Contact person

Rechnungsadressestrasse

1060 Wien

Description

F **K** **U**

Currency

CHF

Exchange rate

04.08.2015

Cost type	Text	AS	Calculation	VAT	Amount
	Total excl. VAT				0.00
	VAT				0.00
	Total incl. VAT				0.00

Comment

F **K** **U**

Save

Reset

Sort

How can I cancel an invoice?

Preconditions

- Finalized outgoing invoice

Steps

1. Go to **“Finances”** > **“Outgoing invoice”**
2. Filter for a job by defining **“Budget year”**, **“Client”**, **“Area”** and **“Job”** and click **“select”**
3. Open the (finalised) invoice of your choice, e.g. by clicking on its **“Status”**
4. Once the invoice details have been opened, a drop-down is displayed at the top of the page (>> **Special function<<**)
5. Select **“Cancellation”** from the drop-down

Selected job
[Josef Manner & Comp AG](#) > [30.1 Online](#) > 006.301602 | Redesign Newsletter [change](#) | [Open in job module](#)

[Back to list](#)

Effective: 9'055.00 EST: 8'500.00 Expense: 270.00 G.P.: 0.00 of these open Employee Expense: 0.00 Advance: 0.00

Agency invoice
 finalized (861)

Name
 Rechnung

Invoice number
 854

Invoice date
 18.5.2016

Service provision
 4.5.2016

Period
 May 2016

Payment target
 30 Days

Specification

Receiver
 rechnungsadressestrassefirmenbez
 Rechnungsadressestrasse
 1060 Wien

Currency
 CHF

Exchange rate
 4.8.2015

Cost type	Text	AS	Calculation	VAT	Amount
Strategy	kick off pauschale	yes		8.00 %	700.00
Strategy	10 Stunden Strategie à 230.00 sadfasdf asdfadsf	yes	10 hours Strategy	8.00 %	2'300.00
Creation	1 Inserat 1/1 à 5'000.00	yes	1 piece Print	8.00 %	5'000.00

6. Clicking the link **“Apply”** underneath the displayed warning will create a credit note – once applied, this cannot be reversed any more

[Back to list](#)

Click on "Apply" to cancel the invoice and to create a credit note.

Warning: This action cannot be undone!


[Apply](#) | [Cancel](#)

Effective: 9'055.00 EST.: 8'500.00 Expense: 270.00 of these OOP: 0.00 of these open Employee Expense: 0.00 Advance: 0.00

Agency invoice finalized (861)	Service provision 4.5.2016	Receiver rechnungsadressestrassefirmenbez Rechnungsadressestrasse 1060 Wien
Name Rechnung	Period May 2016	
Invoice number 854	Payment target 30 Days	
Invoice date 18.5.2016	Specification	

Currency Exchange rate
CHF 4.8.2015

Cost type	Text	AS	Calculation	VAT	Amount
Strategy	kick off pauschale	yes		8.00 %	700.00
Strategy	10 Stunden Strategie à 230.00 sadfasdf asdfadsf	yes	10 hours Strategy	8.00 %	2'300.00
Creation	1 Inserat 1/1 à 5'000.00	yes	1 piece Print Ad 1/1	8.00 %	5'000.00

Please note

- Each credit note receives an invoice number. The cancellation reverses the original invoice by adding the invoiced total as negative figure to balance out the original (incorrect) figure in the agency invoice.
- Neither the cancelled agency invoice nor the the credit note itself are displayed in the **"Debtor list"**.

How can I create a collective invoice?

General information

- Once a collective invoice has been activated, partial billing of estimates (example: taking over only 40%) is not possible any more
 - If you're interested in adding this feature, then please contact support@intevo.net
- Collective invoices can be used for invoicing several jobs within one invoice and can be created based on manual input, expenses/efforts and estimates




Manually creating a collective invoice

- (1) You can manually add (several) costs and assign each cost to a specific job
- (2) Jobs can then be visually separated by inserting the cost types “**Subheading**” and “**Subtotal**” as separators *)

Cost type	Text	Remuneration	AS	Calculation	Job	Cost	MR	MR %	VAT	Amount
2) » Subheading	Design									
Kreation		yes			005.031501 Viral Curator	0.00	140.00	100.00 %	8.00 %	140.00
Design		yes			005.031602 Restore Empowered Communities (2016)	-100.00	0.00	0.00 %	8.00 %	-100.00
» Subtotal	Subtotal									40.00
» Subheading	Easter campaign									
Material		yes			005.031601 Network Cloudified Networks (2016)	0.00	120.00	100.00 %	8.00 %	120.00
Kreation					Please select a job	0.00	0.00	%	8.00 %	0.00
					1)					
Total excl. VAT										160.00
VAT										12.80
Total incl. VAT										172.80

Billing already recorded services according to expense/effort

- You can use the special function “**Bill service**” to copy already recorded expenses/efforts into your invoice
- (1) Choosing the relevant value from the drop-down “Level” will define whether the expenditure linked to the job, the area or the client will be copied
- (2) Use “Add Subtitle and Total” to automatically add subtitles and the subtotal *)
- (3) Now, select individual or all expenditures

Selected job
2017, , ,  [change](#) | [Open in job module](#)

[Back to list](#)

Level

Job status

create position(s)

Period

Subsidiary

1) Area

all

Time entry

From

Until

≡

all

2) ☐ Add subtitle and total

☐ Create auto text

Services

☐ Description

Date

hours

Amount

3) ☐ 005.011601 | Grow Customized Value (2016)

3:00

540.00

[Apply](#) | [Cancel](#)

Billing according to estimates linked to several jobs

- You can use the special function “**Positions from Estimate**” to copy data from already approved estimates
- (1) Choosing the relevant value from the drop-down “**Level**” will define whether the estimates linked to the job, the area or the client will be copied
- (2) Use “**Add Subtitle and Total**” to automatically add subtitles and the subtotal *)
- (3) Now, select individual or all estimates

Selected job

2017 > > > > [change](#) | [Open in job module](#)

[Back to list](#)

1) Level

Job

create position(s)

1 position per estimate position

2) Classification

☐ Add subtitle and total

3) ☐ Cost type

Text

Type

Price

Expenditure open

[Apply](#) | [Cancel](#)

*) The option **"Add Subtitle and Total"** is only available if layout positions (i.e. **"Subheading"**, **"Inserted Text"**, **"Subtotal"**, **"Page Break"**, **"Break / Balance"**) are activated in your **TEAMBOX**.

Collective invoice as PDF

General information

- All details (i.e. all positions, subheadings and subtotals) *) can be displayed/printed
- If subheadings and subtotals have been already added when creating an estimate, the option “Add Subtitle and Total” should not be used

Using the keyword “Collective invoice” (supplementary feature) in a PDF

- Specific details related to a position can be explicitly omitted by using the chargeable keyword **“Collective invoice”**
- Consequently, only subheadings and subtotals are printed
- The individual positions themselves, however, are not printed
- If you’re interested in adding this feature, then please contact support@intevo.net

[illegible]

*) The option **"Add Subtitle and Total"** is only available if layout positions (i.e. **"Subheading"**, **"Inserted Text"**, **"Subtotal"**, **"Page Break"**, **"Break / Balance"**) are activated in your **TEAMBOX**.

How can I approve an outgoing invoice?

Preconditions

1. A valid outgoing invoice has been created and assigned to you
2. The new outgoing invoice shows up as a message in your notifications OR can be found in **“Finances” > “Outgoing invoice”** by filtering for outgoing invoices with **“Status” “submitted”**

Steps

1. Click the (link of the) outgoing invoice
2. From the buttons displayed at the bottom of the page, click **“Confirm”** and then **“Ok”**
=> The issuer of the outgoing invoice will be notified that the outgoing invoice has been confirmed

How can I manually bill an outgoing invoice?

Steps

1. Search for / filter for your outgoing invoice (e.g. **"Status" == "finalized"**)
2. Double-click the line featuring your invoice
3. At the end of the new page, click **"Payment"**
4. In **"Payments"**, you can now either ...
 - a. approve **payment of the entire sum** by simply checking the check-box **"Set invoice to paid"**
 - b. approve **partial payment of the overall sum** by changing **"Amount"** to the currently received amount (**HINT**: note that **"Open amount"** will now show the difference between what has been and still needs to be paid)
=> **HINT**: If you approve a partial payment for this invoice, then you will see the open sums the next time you view the **"Payment"** option for this invoice)
5. Click **"Ok"**
=> The full / partial payment has been booked
HINT: If you wish to book a full payment for an invoice while at the same time granting a discount, simply enter the discounted sum (i.e. invoice amount minus discount) in **"Amount"** and check the **"Set invoice to paid"** check box)

Recurring invoice

GENERAL

- This feature enables you to schedule recurring invoices in the system which will then be generated based on the defined frequency or for the defined, fixed date.
- You can either define partially billed amounts for cost estimates (in total, these partial sums need to amount to 100% of the overall estimated sum) or create other types of recurring positions that are automatically billed in a user- defined interval and are freely customizable.

PLEASE NOTE: This feature is subject to a fee. Please contact your **intevo** representative for more details.

How can I generate recurring invoices?

Recurring amounts for cost estimates

1. Open an existing job and browse an existing cost estimate or create a new one
2. Open the cost estimate and click **'Edit'** at the bottom of the page
3. Towards the bottom of the page, choose a date from **"Billing date"** to define when a specific part of the overall amount should be billed
4. In the column **"Percent"** define how much of the overall amount should be billed (e.g. "50%") on this date
5. Depending on the previously entered percentage, repeat the last two steps by clicking the **'plus'** icon until a billing rate of 100% has been achieved (i.e. billing the entire sum will be split up in these partial sums)
6. Click **'Save'**, then click **'Finalized+PDF'** and **'Approve'** the estimate
7. Go to **"Finances" > "Billing list"** and choose the previously defined **"Billing date"** from the drop-down
=> The recurring cost estimate for this job is displayed in the table as part of the overall amount in the column **'Recurring'**

The screenshot shows the 'Cost type' section of a cost estimate. It includes a table with columns: VAT, AS, Planning, Calculation, Costs, Costs, MR EUR, MR %, and Price EUR. The table has rows for 'Total excl. VAT', 'VAT', 'Total incl. VAT', and 'Total MR'. Below the table, there is a 'Comments' section. At the bottom, there is a 'Billing date' dropdown menu and a table with columns: Billing date, Percent, and Partial amount. The table has a row with a date, 100, and 0,00. Below this row, there is a 'plus' icon for adding more rows. A purple arrow points to the 'Billing date' dropdown, and another points to the 'plus' icon.

Other recurring positions

1. Browse an existing job
2. Scroll down and click the link **"Recurring positions"**
=> The tab **"Recurring positions"** is displayed
3. Click the green **'plus'** icon to add a new positions
4. Select a date from **"First execution"** to define when the amount should be billed for the first time
5. At **"Interval"**, choose the level of frequency for the amount to be billed (e.g. monthly)

6. Choose a **“Cost type”** from the drop-down
7. Enter the **“Amount”**
8. Go to **“Finances” > “Billing list”** and choose the previously defined date from the drop-down
=> The recurring position for this job is displayed in the table as part of the overall amount in the column **‘Recurring’**

Billing list

GENERAL

This feature is particularly useful if you want to automatically visualise and facilitate billing open staff expenditures.

How can I visualise open services in the billing list?

Preconditions

- Existing job with time tracking entries that haven't been billed yet

Steps

1. Browse an existing job, area or client (depending on which level you want to define the automatically recurring expenditure for) and click **"Agency invoices"**
2. Click **"Settings"** in the top menu (underneath the main navigation)
3. Click the tab **"General settings"**
4. In the list of settings, make sure that **"View entered but not yet billed activities in billing list"** has been enabled and save your changes
5. Go to **"Finances" > "Billing list"** and choose the relevant date from the drop-down
6. The relevant open amounts for this job are being displayed in the column **"Open services"**

How can I create invoices from the billing list?

Steps





1. Select the relevant job from the list by clicking its line
2. Click the button **“Create invoice”** at the bottom of the page
 - a. **PLEASE NOTE:** You can also select several lines from the list by using the usual keyboard shortcuts
3. When the **“Create invoices”** notification is displayed, click **“Ok”**
=> **“Invoices are being created...”** is displayed
=> **“Finances” > “Outgoing invoice”** for this job is displayed, listing the automatically generated sums
4. Optionally, make individual changes to the displayed sums / texts and/or add additional positions to this invoice
5. Click **“Save”** at the bottom of the page and follow the usual steps for approving this invoice

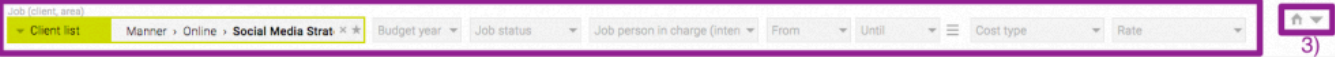
Controlling

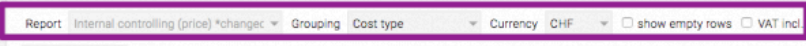
- [How does “Controlling” work?](#)

How does “Controlling” work?

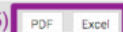
Steps

- (1) Go to “**Finances**” > “**Controlling**” and filter for specific entries by “**Budget year**”, “**Client**”, “**Area**” and “**Job**”. Now, you can fine-tune which data is displayed in which way.
- (2) Choose a pre-defined report from “**Report**”, change how the data is grouped in “**Grouping**” or change the currency of the displayed data in “**Currency**”
 - Select “**show empty rows**” to include data for which no entries have been created yet
 - Select “**VAT incl.**” to display all figures inclusive of VAT
- (3) Click  to display even more filtering options; clicking  will clear your search
- (4) The columns can be sorted in ascending or descending order, such as the first column by clicking the  icon
 - Moving your cursor over the column titles will display a  icon; clicking this will open a window where you can select more columns either via drag & drop from the left list to the right list, or by double-clicking in combination with drag and drop.
 - Click “**Save**” to apply all changes.
- (5) Clicking the button “**PDF**” or “**Excel**” at the bottom of the page will export the controlling list as PDF or Excel file

1) 

2) 

Cost type	Estimates agency+OOP (Price)	Expenditure agency (price)	Expenditure OOP	Expenditure agency+OOP (price)	Estimates agency+OOP - expenditure (Price)	Billed agency+OOP	Billed agency+OOP - Estimate	Billed agency+OOP - Expenditure	Advance balance
Strategy	0.00	3'450.00	0.00	3'450.00	-3'450.00	0.00	0.00	-3'450.00	0.00
Account Manag...	1'000.00	3'630.00	0.00	3'630.00	-2'630.00	0.00	-1'000.00	-3'630.00	0.00
Creation	2'300.00	0.00	0.00	0.00	2'300.00	0.00	-2'300.00	0.00	0.00
Movie production	0.00	0.00	5'000.00	5'000.00	-5'000.00	0.00	0.00	-5'000.00	0.00
	3'300.00	7'080.00	5'000.00	12'080.00	-8'780.00	0.00	-3'300.00	-12'080.00	0.00

5) 

Forecast

- [How can I create forecasts?](#)
- [Which insights can I gain from forecasts?](#)

How can I create forecasts?

General info

The **“Forecast”** module enables you to estimate future revenue based on current and historical financial data. Forecasts are monthly-based revenue predictions and can be created for the total of your customers and also include historical data that is both displayed in the module as well as contrasted with the originally forecast values.

PLEASE NOTE: Any created forecast is automatically saved. Therefore, only click **“Finalized”** once you’ve made sure that all entered data is correct, as finalized forecasts cannot be edited any more.

Year: 2016 Forecast version: 2016/5 (Version A) x Subsidiary: Comparison values: Differences: do not show

Forecast 2016/5 (Version A)

Client	Note	Budget	Total	Jan	Feb	Mar	Apr	May	Jun
AALA		78.000	0	0	0	0	0		
AALS		50.000	0	0	0	0	0		
Aaronson		407.000	468.416	0	0	0	0	74.044	10.143
ABC_AT		436.850	464.319	0	0	0	0	6.097	87.991
ABCO_A				0	0	0	0	54.881	14.885
Access-				0	0	0	0	43.994	2.273
Action_A				0	0	0	0	63.585	22.487
Acuserv				0	0	0	0	53.516	39.061
Total				0	0	471.390	0	3.395.447	2.803.462

Year: 2017 From month: January Comment:
☒ Use current forecast as a basis. Note: For past months, ACTUAL data is stored.
☒ Copy notes
 OK

Refresh New forecast PDF Excel Confirm Finalized Delete

Steps

1. Go to **“Finances”** > **“Forecast”**
2. Click the button **“New forecasts”** at the bottom of the screen
3. Choose a (future) base date from the pop-up and click **“Ok”**

HINT: enter a **“Comment”** to facilitate distinguishing similar versions from each other

=> Depending on the selected month, the displayed table will contain historical financial data to one side and empty columns for the upcoming months on the other side

HINT: The historical data reflects the actual revenue and is colour-coded:

- a. green font colour => more revenue achieved than planned in „Forecast“:

- b. red font colour => less revenue than planned

HINT: Hover over the coloured numbers to display the originally forecast value

4. Choose the relevant data type from the drop-down “**ACTUAL data according to**” for your historical data:
 - a. “**Invoice date**” will group the revenue based on the month the invoices were issued
 - b. “**Service provision**” groups the numbers according to the month the service was provided in
 5. Next, enter your predicted values for one or several clients and one or several future months in the empty cells – you can do so on:
 - a. **client level** (i.e. enter the values in the cells => highest level)
 - b. **area level** (i.e. click the client name and enter the values in the cells => lower level; below client level)
 - c. **job level** (i.e. click the area name and enter the values in the cells => lowest level; below area level)

HINT: If you enter figures at the **highest level** (i.e. client level), these figures will not be aggregated on lower-level cells;

HINT: If you enter figures at a **lower level with already entered figures on a higher level**, the affected cells will be coloured red and a mouse-over warning is displayed (i.e. “**Warning: Amounts have already been entered at a higher level**”); however, these cells can be edited anyway, despite the warning

HINT: If you enter figures at a lower level (i.e. from job to area level and from area to client level), these **WILL** be aggregated on their higher levels, are displayed in a **grey** font on the higher levels and are write-protected on that higher level
 6. Once you have entered all your figures for your forecast **AND** have made sure the numbers are correct, these numbers are automatically saved, irrespective of navigating away or logging out.
 7. Depending on your user permissions, use the confirmation workflow to pass on finalizing to another member of staff with the relevant permissions or click “**Finalized**”.
- WARNING:** Once a forecast has been finalized, it cannot be edited any more.
- => The forecast has been finalized and is ready for use.

Which insights can I gain from forecasts?

Preconditions

- at least one existing forecast

Steps

- Go to **“Finances“** > **“Forecast“**
- At the drop-down **“Comparison values“**, select at least one forecast (e.g. **‘Actual 2016’**)
=> The table will now display three different values every three lines to facilitate comparing previous revenue with current actual and forecast data:
 - a) the current actual / forecast data;
 - b) the historical data derived from the other chosen forecast;
 - c) the difference between those two

Settings

- [How can I define general financial settings?](#)
 - [What kind of billing types are there?](#)

How can I define general financial settings?

General information

- After creating a new job, the settings have to be confirmed or changed when either
 - opening the job via the **“Finances”** module or
 - accessing the job via **“Jobs”** and then clicking **“Open finance settings”**
- The general settings can be adapted at any level of the hierarchy (i.e. **Agency >> Client >> Area >> Job**), with the sub levels inheriting the settings from the level above. Consequently, a newly created job will inherit higher-level settings (but they will not be refreshed when changing the higher-level settings again at a later stage) and will mostly only need confirming these settings.

Selected client
 2017 > TEAMBOX AG [change](#)

General settings
 Percentages
 Exchange rates
 Tax

Language
 Deutsch

Currency
 Schweizer Franken

Tax number
 2310043-1

Payment period
 30 Days

Bank details
 Bank Blumenstein, Zürich
 Konto 87878

Standard receiver
 »Client address«

Budget
☒ include in budget

Estimate
 Addressee
 »no entry«

Grouping/Sorting
 Cost types

☒ Print header and footer
☐ Print VAT

Invoices and Bordereaux
 Addressee
 »no entry«

Grouping/Sorting
 none

☐ Add delivery address
☐ Print header and footer

Billing type
 Client pays third party invoices directly

☒ Use bordereaux
☐ Bordereaux with agency invoices

Specification

Bookkeeping
☐ Debtor account of client

Cost unit number

Save

Reset

What kind of billing types are there?

General information

In “**General settings**”, you can set the following three “**Billing types**”:

Client only receives agency invoices

For all services offered by the agency, the client pays all costs directly to the agency and won't receive any direct third-party invoices.

With this setting, all incoming invoices are created as Out of Pocket (OOP) invoices, financed in advance by the agency and then the client is charged for these as part of the overall agency invoice (disclosed or hidden).

Client pays third party invoices directly

Clients pay all third-party invoices (as proposed in the estimate) themselves. However, the agency receives the contractors' invoices first to add them as third-party invoices in **TEAMBOX** in order to ensure coherent records.

Client pays third party invoices via agency

The agency first pays the third-party invoices for the client and then charges the client at a later stage using a payment bordereau which will be sent to the client on top of the agency invoice.

Selected client
2017 › TEAMBOX AG [change](#)

General settings

Percentages

Exchange rates

Tax

Language

Deutsch ▼

Currency

Schweizer Franken ▼

Tax number

2310043-1

Payment period

30 Days

Bank details

Bank Blumenstein, Zürich
Konto 87878

Standard receiver

»Client address«

Budget

☒ include in budget

Estimate

Addressee
»no entry« ▼

Grouping/Sorting
Cost types ▼

☒ Print header and footer
☐ Print VAT

Invoices and Bordereaux

Addressee
»no entry« ▼

Grouping/Sorting
none ▼

☐ Add delivery address
☐ Print header and footer

Billing type

Client pays third party invoices directly ▼

Client only receives agency Invoices

Client pays third party invoices directly

Client pays third party invoices via agency

Specification

Bookkeeping

☐ Debtor account of client

Cost unit number

Save

Reset

PRODUCTION

GENERAL

- The “**Production**“ module can be used to systematically gather offers for (production) services from a variety of suppliers.
- **PLEASE NOTE:** The document templates listed in this tool are defined in the project initiation phase.

In this section, you will find information on the following topics:

- [How can I create a new production request?](#)
- [How can I work with offers following a production request?](#)
- [How can I accept an offer and turn it into a production order?](#)
- [Where can I look for existing production documents?](#)

How can I create a new production request?

STEPS

1. Go to **“Production“** > **“New document“**
2. Select **“Request“**
3. Choose a **“Template“** from the drop-down
4. Click the button **“New“** at the bottom of the page
5. Choose a job for the production request using the drop-downs and click the button **“Save“** at the bottom of the page
=> The tab **“Request“** is displayed
6. Enter all the details for your production request in the template and click the button **“Save“** at the bottom of the page
7. Clicking the button **“PDF“** at the bottom of the page will create a PDF document that only prints those fields that have been filled out
 - a. **PLEASE NOTE**: empty fields and their headers will not be included in the PDF
8. Click the button **“Finalized“** at the bottom of the page
9. In the tab **“Receiver“**, specify the recipients the production request should be sent to by clicking the green **‘plus’** icon
10. Start entering a **“Company“** name in the field (as specified in your addresses) and choose the company name from the displayed list
11. Customize the request by supplying a **“Contact person“** and an **“Address“**
12. From **“Shipment“**, choose the type of communication to be established with the potential supplier (e.g. **“Email“**)
13. Save your input by clicking on the green check icon and repeat the previous steps to define several other suppliers
14. Once you have defined all recipients, mark all relevant suppliers and click **“Create request“**
=> The requests have been generated (PDF) and/or transmitted (email)
15. Browse the job and scroll down to **“Production requests/orders“**
=> The newly created production request is listed in the job

How can I work with offers following a production request?

STEPS

1. Go to **“Production”** > **“Request/order”** and choose one request
2. Click the Button **“Create offer”**
3. Choose a **“Supplier”** from the list, add **“Comments”** (e.g. **“too expensive”**), specify the offer price in **“Amount”** and/or upload the received offer file to **“File(s)”**
4. Confirm your changes by clicking the green **‘check’** icon
—> The respective offers of the suppliers have been deposited

The screenshot displays the Teambox web application interface. At the top is a navigation bar with icons for various modules: Calendar, Addresses, Jobs, Activities, Time tracking, Finances, Production (highlighted), Documents, Admin, Employees, Manual, and Passwords. Below this is a sub-header with 'Document search', 'New document', and 'Request/order' (selected). The main content area shows details for a request: Job '059.201601 | Tennis', Status 'Finalized request', Number '11', Title 'Offertanfrage Druck', Date '17/08/2018', and Comment. There are sections for 'File(s)' and 'Price comparison', each with an 'Upload file' button. Below this is a tabbed interface with 'Request', 'Receiver', and 'Offer' (selected). The 'Offer' tab shows a table with columns: Supplier, Contact person, File(s), Comments, and Amount. A single offer entry is visible for 'Speck Print AG' with contact 'Hans Muster', comment 'too expensive', and amount '2000'. At the bottom right of the offer entry are three buttons: a green checkmark, a red X, and a minus sign.

Supplier	Contact person	File(s)	Comments	Amount
Speck Print AG	Hans Muster	+ Upload file	too expensive	2000

How can I accept an offer and create a production order from it?

Preconditions

An offer was created in the TEAMBOX

STEPS

1. Go to **“Production“** > **“Document search“**
2. Browse the job and scroll down to **“Production requests/orders“** and choose one request
3. You are in the **“Offers“** tab
4. Click on the button **“Create order“**
 - a. A popup window **“Create order“** opens
5. Select the desired offer
 - a. The supplier is automatically entered as recipient and can be adjusted manually (for example, shipment)
6. Click **Save**

=> The newly created job is displayed and changes can still be made
7. Click on the button **“Finalized“**

Job
065.011401 | Katalog

Status
Finalized request

File(s)

+ Upload file

Price comparison

+ Upload file

Request

Receiver

Supplier

10000 Auto Parts

A. L. Price

+

Please modify the specificati

Create order

Create order

Template
Druckauftrag

Offers and requests

A. L. Price	Frau Juliane Weisz	100,00
10000 Auto Parts	Frau Brigitte Brauer	150,00

Supplier

A. L. Price

Frau Juliane Weisz

Shipment

Mail

JulianeWeisz@pookmail.com

Cancel

Save

Where can I look for existing production documents?

STEPS

1. Go to **“Production”** > **“Document search”**
2. Filter for production documents by either ...
 - a. Choosing the job using the **“Client”**, **“Area”** and **“Job”** drop-downs **AND/OR**
 - b. Searching for its **“Number”** **AND/OR** **“Title”** **AND/OR** **“Comment”** **AND/OR** **“Supplier”** **AND/OR**
 - c. Specifying who the document has been **“Edited by”** **AND/OR**
 - d. Browsing its **“Status”** **AND/OR**
 - e. Selecting a time **“Period”** from the date field(s) **AND/OR**
3. Click the **“Search”** button at the bottom of the page
=> The search results are displayed

Teambox

Calendar Addresses Jobs Activities Time tracking Finances Production Documents Admin Employees Manual Passwords

Document search New document Request/order

Client/area/job
Adidas | 59 20 | BTL 059.201601 | Tennis ☒ Only show active

Number Title Comment Edited by
»select« active

Status Suppliers Period
»select« / Until

Search Reset PDF Excel

DOCUMENTS

In this section, you will find information on the following topics:

- [How can I create a new document?](#)
- [Where can I look for existing documents?](#)

How can I create a new document?

GENERAL

- In **TEAMBOX**, you can define freely customizable documents for template and recurring use.
- Your templates may be defined in the **TEAMBOX** initiation phase and will be displayed in the list of **“Document types”**.

STEPS

1. Go to **“Documents”** > **“New document”**
2. Select a **“Document type”** from the drop-down
3. Select a job from **“Favourites”** (i.e. a list of jobs featuring recent time tracking) **OR** by choosing the job using the **“Client”**, **“Area”** and **“Job”** *drop-downs
4. Click the button **“Next”** at the bottom of the page
=> More options are displayed
5. Choose / customize a **“Recipient”** from the drop-down
6. Add a **“Tag”** to this document to facilitate finding it
7. Optionally, customize the **“File name”**
8. Depending on your user’s permissions, you may (not) see the checkbox **“Confidential”**; clicking it will turn this document into a confidential document that may only be viewed by users with the relevant permissions
9. Click the button **“Save”** at the bottom of the page
=> **“Editor”** is displayed
10. Customize the document by specifying the relevant information in the text fields
11. **HINT**: In addition to the editor features, you can also use **“Text blocks”** for this document by clicking the puzzle piece icon
12. Click **“Save”** at the bottom of the page
13. Depending on your use case, you may now print the document by clicking the **“PDF”** button at the bottom of the page; alternatively, browse the job the document has been created for
14. On the job page, scroll down to get to the **“Documents”** section
15. Expand the list of files to view the recently added document

TeamBOX

Calendar

Addresses

Jobs

Activities

Time tracking

Finances

Production

Documents

New document

Document search

Document type

Besprechungsbericht

Job

Favourites

»no entry«

☒ Only show active

Client

Adidas | 59

Area

20 | BTL

Job

059.201601 | Tennis

Next

Where can I look for existing documents?

STEPS

1. Go to **“Documents“** > **“Document search“**
2. Filter for documents by either ...
 - a. Selecting a job from **“Favourites“** ***(i.e. a list of jobs featuring recent time tracking)**
***AND/OR**
 - b. Choosing the job using the **“Client“, “Area“ and “Job“** drop-downs **AND/OR**
 - c. Choosing the document's **“Author“** from the drop-down **AND/OR**
 - d. Selecting a time **“Period“** from the date field(s) **AND/OR**
 - e. Entering a term in **“Search terms“** **AND/OR**
 - i. **HINT**: This will filter for the tags defined in the tag field of the documents
 - f. Specifying the **“Document type“**
3. Click the **“Search“** button at the bottom of the page
=> The search results are displayed

TeamBOX

Calendar

Addresses

Jobs

Activities

Time tracking

Finances

Production

Documents

New document

Document search

Client/area/job

Favourites

»no entry«

☒ Only show active

Client

Adidas | 59

Area

20 | BTL

Job

059.201601 | Tennis

Author

»select«

☒ active

Search terms

Period

From

Until

Document type

»select«

Search

Reset

ADMIN

In this section, you will find information on the following topics:

- [Where can I define roles, departments and functions?](#)
- [Which settings can be defined / customized for activities?](#)
- [Where can I define / customize calendar categories and resources?](#)
- [Where can I define the industry sectors for my contacts?](#)
- [How can I define the job status and the start of the budget year?](#)
- [Where can I define cost types?](#)
- [Where can I define services?](#)
- [Where can I define rates?](#)
- [How can I combine new cost types, services and rates?](#)
- [How can I assign permissions to roles?](#)
- [Where can I change notification settings for Messages?](#)

Where can I define roles, departments and functions?

“Settings” > “Agency organisation”

- Here you can create roles, departments and functions which should then [be linked to permissions and corresponding employees](#).

General Info – Settings Role

- Roles are used to define different levels of permissions (i.e. access and editing rights) in order to assign these to different users / user groups.

Steps

1. Go to **“Settings” > “Agency organisation”**
2. At **“Role”**, click the green ‘plus’ icon
3. Enter the name of the new role and confirm your changes by clicking the green ‘check’ icon
 - a. **HINT**: depending on which permissions will be linked to this role, the role should be moved within the list according to its level of permission, i.e. roles with the least / most permissions should be moved to the top / end of the list respectively
4. At the bottom of the page, click **‘Save’**
=> The new role is now available in the system.

Agency organisation | Activities | Calendar | Sectors | Jobs | Tax

Role

Freelancer
Kreation
Beratung
Projektleitung
Produktion
Administration
Geschäftsleitung

The employees are grouped according to Roles (e.g., Management, Administration, Office, etc.) and permissions are set for the Roles. Order the Roles in ascending priority for the Permissions Level so that the Role with the lowest level is displayed in the first position in the Permissions Editor.

Department

Beratung
Kreation
Services

Employees are organized into organizational units via departments (e.g., Creation, Consultancy, etc.) These can be used for the Calendar, Reports and various other evaluations in the TEAMBOX. Activities for time tracking can be assigned to various departments.

Function

Function	Cost
Creative Direction	120.00
Art Direction	100.00
Grafik	80.00
Text	100.00

The employees can be grouped by function (e.g. Management, Group Leader, Senior, Junior, etc.) and these can be used in the services management to define differing prices based on function.

General Info – Settings Department

- The departments created in this section can be filtered for in different sections of the system and also affect Controlling.

Steps

- Departments should be created in the same way as Roles.

General Info – Settings Function

- This feature is optional and may or may not be part of your installation depending on your customization.
- The functions created in this section can be used for defining the average price model depending on the person's level / function and affects the marginal return and estimates. The actual price model is defined in [“Employees”](#)

Steps

- Functions should be created in the same way as Roles.

Which settings can be defined / customized for activities?

Steps

1. Go to **“Settings” > “Activities”**
2. Define / change the following settings according to your preferences:
 - a. **“Use tasks for Activity”** => enable using tasks for work packages
 - b. **“Use start date”** => enable using activity start dates (in addition to end dates)
 - c. **“Use time”** => add an extra column **“Time”** in **“Activities” > “Activity list”** to define the time (format hh:mm)
 - d. **“Allow further person in charge”** => add extra line for work packages to define **“Further person in charge”**
 - e. **“Emphasize days before due date in blue”** => define how many days before an activity's due date the days' colour will change to blue
 - f. **“Replace employee and internal persons in charge in PDF with”** => insert the company name as replacement for employee names and internal persons in charge when exporting activity data as PDF
 - g. **“Use following colour for employees and persons in charge”** => define the displayed 'company colour' in activities as hexadecimal code or using the colour picker
 - h. **“Attribute”** column => define custom attributes and custom colours to enable / expand filtering for these attributes and customize their visual representation.
 - i. **“Person in charge”** column => define persons in charge (internal or external)
 - j. **HINT**: click **“yes”** in column **“Internal”** for internal work teams OR leave **“Internal”** blank for external contractors to be assigned as **“Person in charge”**.
 - k. **HINT**: for externals, you can assign custom colours to customize their visual representation (e.g. in the [Gantt chart](#)); internals will be assigned the earlier defined 'company colour' (i.e. **“Use following colour for employees and persons in charge”**).
 - l. **“Workload ”** column => define a heat map for resource planning depending on your work model (e.g. 38.5 hours per week). You can define the minimum and maximum possible workload for all employees as percentage, including custom steps from minimum to maximum (e.g. 20 – 40% – 60% – 80% – 100% – 120% workload).
HINT: for each stage, you can assign a custom colour to represent the extent of the workload. Usually, a colour scheme ranging from bright green (e.g. #55AA00) to dark red (e.g. #550000) has proven to be a useful colour scheme, hence the term 'heat map'.
3. At the bottom of the page, click **‘Save’**
 => The settings have been applied to the system.

Agency organisation

Activities

Calendar

Sectors

Jobs

Tax

General settings

☒ Use tasks for Activity

☒ Use start date

☐ Use time

☒ Allow further person in charge

4 Emphasize days before due date in blue

Replace employee and internal persons in charge in PDF with TEAMBOX

Use following colour for employees and persons in charge #C8D700

Attribute	Colour	Person in charge	Internal	Colour	Workload (%)	Colour
On-Air Termine	#00D9FF	Kunde		#43539A	20	#55AA00
Statusreport	#C8F131	Lieferant			40	#CCE600
Krea-Liste	#50DCA5	Lithograf			60	#FFFF00
DTP	#CACBCA	Druckerei			80	#FFDD00
Agenda	#D2B0DC	Freelancer Maximilian			100	#FF9000
Protokoll	#714A8A	Adidas		#B5B8B5	120	#FF0000
+		Team A	yes		150	#AA0000
		+			200	#550000

You can add further people in charge to activities. Use "internal" for agency persons in charge (e.g. Consultancy Group 1), leave the option for the external person in charge (e.g. Client, Printshop) empty.

Save

Reset

Where can I define / customize calendar categories and resources?

General information

When [creating a new or editing an existing calendar event](#), you can

- assign a category to the event
- book available resources such as meeting rooms or meeting equipment.

These can be defined in **“Admin”**.

Steps

1. Go to **“Admin”** > **“Settings”** > **“Calendar”**
2. At **“Calendar categories”**, ..
 - a. add a new category by clicking the ‘plus’ icon at the end of the list
 - b. define a category name and click the green ‘check’ icon to save your changes
 - c. define / pick a **“Colour”**
=> the event will be coloured accordingly in the calendar overview once the category is being assigned to an event
3. At **“Resources”**, ..
 - a. add a new resource (same procedure as above)
 - b. enter the **“Description”** to facilitate using the resource
HINT: new resources are automatically set to active; setting **“Active”** to **“no”** will keep the resource in the system but make it unavailable for selection (e.g. if a bookable resource is temporarily broken)
4. At the bottom of the page, click **‘Save’**
=> The calendar settings have been applied to the system.

Agency organisation	Activities	Calendar	Sectors	Jobs	Tax																												
<table border="1"> <thead> <tr> <th>Calendar categories</th> <th>Colour</th> <th>Intensive Colour</th> <th>automatic</th> </tr> </thead> <tbody> <tr> <td>Intern</td> <td>#E2E2E2</td> <td>yes</td> <td></td> </tr> <tr> <td>Kunde</td> <td>#F0ECAE</td> <td>yes</td> <td></td> </tr> <tr> <td>Partner</td> <td>#ABD5DF</td> <td>yes</td> <td></td> </tr> <tr> <td>Abwesenheit</td> <td>#FFFFFF</td> <td>yes</td> <td></td> </tr> <tr> <td>Wichtig</td> <td>#FFBC00</td> <td>yes</td> <td></td> </tr> <tr> <td colspan="4">+</td> </tr> </tbody> </table>						Calendar categories	Colour	Intensive Colour	automatic	Intern	#E2E2E2	yes		Kunde	#F0ECAE	yes		Partner	#ABD5DF	yes		Abwesenheit	#FFFFFF	yes		Wichtig	#FFBC00	yes		+			
Calendar categories	Colour	Intensive Colour	automatic																														
Intern	#E2E2E2	yes																															
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<table border="1"> <thead> <tr> <th>Resources</th> <th>Description</th> <th>Active</th> </tr> </thead> <tbody> <tr> <td>Meetingraum RIGEL</td> <td>Meetingraum gross</td> <td>yes</td> </tr> <tr> <td>Meetingraum Schwert</td> <td>Meetingraum klein</td> <td>yes</td> </tr> <tr> <td>Beamer</td> <td>im Meetingraum</td> <td>yes</td> </tr> <tr> <td>Firmenwagen</td> <td>VW Golf</td> <td>yes</td> </tr> <tr> <td>Geschäftsauto</td> <td>Mini</td> <td>yes</td> </tr> <tr> <td>Kamera</td> <td>Canon</td> <td>yes</td> </tr> <tr> <td>Produktionsmaschine 1</td> <td></td> <td>yes</td> </tr> <tr> <td colspan="3">+</td> </tr> </tbody> </table>						Resources	Description	Active	Meetingraum RIGEL	Meetingraum gross	yes	Meetingraum Schwert	Meetingraum klein	yes	Beamer	im Meetingraum	yes	Firmenwagen	VW Golf	yes	Geschäftsauto	Mini	yes	Kamera	Canon	yes	Produktionsmaschine 1		yes	+			
Resources	Description	Active																															
Meetingraum RIGEL	Meetingraum gross	yes																															
Meetingraum Schwert	Meetingraum klein	yes																															
Beamer	im Meetingraum	yes																															
Firmenwagen	VW Golf	yes																															
Geschäftsauto	Mini	yes																															
Kamera	Canon	yes																															
Produktionsmaschine 1		yes																															
+																																	
Sort																																	

Where can I define the industry sectors for my contacts?

General information

Once an industry sector (such as “Agency”, “Photographer”, “Hospitality” and the like) has been created, it can be assigned to a contact (“**Addresses**” > **contact details** > **drop-down “Sector”**) and you can also filter for contacts based on their assigned sector.

Steps

1. Go to “**Admin**” > “**Settings**” > “**Sectors**”
2. At the end of the list, click the green ‘plus’ icon to create a new industry sector
3. Enter the industry name and (de)select “**Partner**”, “**New business**” and/or “**Client**”, depending on which types of contact should be able to be assigned to this type, and click the green ‘check’ icon to save your changes
4. At the bottom of the page, click ‘**Save**’
=> The industry sector has been added to the system.

How can I define the job status and the start of the budget year?

General information

Here, you can define a custom job status (i.e. what is the current state of the job and what should be the name of that status?). Once a job status has been defined, it can be used in **“Jobs” > “Job management” > “Job overview” > “Job information” > “Status”**.

Steps

1. Go to **“Admin” > “Settings” > “Jobs”**.
2. To add a new job status, ..
 - a. Click the green ‘plus’ icon at the end of the list
 - b. Enter a status name and (un)check **“Active”** depending on your use case
 - c. **HINT**: if a job status is set to inactive, the job will not automatically be listed in the tab **“Jobs” > “Job management” > “Jobs”**, but you would have to deselect the checkbox **“only active”** in the top-right corner of the tab to display jobs with an inactive job status
 - d. If applicable, select **“Start”** or **“End”** in the column **“Set date”**
 - e. **HINT**: if, for instance, **“Start”** is defined for this status, a new / edited job would be affected as such: as soon as this job status would be assigned to a job, today’s date (i.e. when the job is thus changed) would be set as **“Start”** date for this job

Job information

- f. Save your changes by clicking the green ‘check’ icon

3. To change the start of the budget year, ..
 - a. Select the relevant date from the drop-downs at “**Budget year start**”
 - b. **HINT**: for most systems, we do not recommend the use of the automated feature “**Suggest next budget year**” – using this would automatically set the next budget year for jobs that stretch into the next budget year, but most clients prefer to change the budget year manually
4. At the bottom of the page, click ‘**Save**’
=> The job settings have been applied to the system.

Where can I define cost types?

General information

The following settings affect all areas with **“Services”** and **“Rates”**, e.g. **“Estimates”** & **“Time Tracking”**. You can see everything in **“Jobs”** > **“Job management”** > **“Rates”** => Rate name, cost, price,

Steps

1. Go to **“Admin”** > **“Services admin”** > **“Cost types”**
2. At the end of the list, click the green ‘plus’ icon
3. Enter the name of the cost type (e.g. “Project management”, “Print”, “Media”, etc.)
4. (optional) At **“Function”**, you can/should link a specific process with that cost type, depending on which function should automatically be linked to a specific cost type:
 - a. e.g. cost type “Project Management” + function “Discount” => “Project Management” would always be linked with a discount
 - b. e.g. cost type “Staff Expense” => should always be linked to function “Staff expense”
5. Click the green ‘check’ icon to save your changes
6. At the bottom of the page, click **‘Save’**
=> The new cost type has been created.

Where can I define services?

General information

- The following settings affect time tracking.

Preconditions

- Please [define a cost type](#) first

Steps

1. Go to **“Admin” > “Services admin” > “Services”**
2. At the end of the list, click the green ‘plus’ icon
3. Enter the service description (e.g. “Acquisition”, “Consulting”, “Training”, etc.)
4. At **“Cost type”**, select (if applicable) the matching cost type
5. At **“Type”**, choose ..
 - a. **“internal”** for any type of service that is not connected to external (client) work (e.g. research, administration)
 - b. **“external”** for client-related services (e.g. “Consulting”, “Training”)
 - i. Towards the end of the line, select those departments which should be able to book services for this service type
6. At **“Info”**, select **“yes”** if you want to make entering extra information in time tracking mandatory for this service
7. Click the green ‘check’ icon to save your changes
=> The new service has been created and can now be selected from the drop-down **“Service”** in time tracking.

Where can I define rates?

General information

These settings are used for defining the rates of your agency.

Preconditions

- Please [define a cost type](#) and [a service](#) first

Steps

1. Go to **“Admin” > “Services admin” > “Rates”**
2. At the end of the list, click the green ‘plus’ icon
3. Enter a new **“Rate name”** for the service (e.g. “Art Direction”, “Programming” or “Texting”, etc.)
4. Select the correct **“Unit”** type (i.e. **“hour”** or **“piece”**)
5. At **“Cost”**, enter the cost of producing / creating the service
6. At **“Price”**, enter the price customers will be charged for that service
7. Click the green ‘check’ icon to save your entry

PLEASE NOTE: After defining cost types, services and rates you lastly have to assign the rates in [Assignment](#) accordingly

How can I combine new cost types, services and rates?

General information

Once the [cost type](#), [service](#) and [rate](#) have been created, they must be combined in order to be used in the system (e.g. in time tracking or when creating a new estimate calculation).

Steps



1. Go to **“Admin” > “Services admin” > “Assignment”**
2. Select the new cost type at **“Cost type”**
3. In the next column, click **“Assign service”** and select the associated new services
=> The newly assigned service will disappear from the services check list to the right
4. In the next column, click **“Assign rate”**
=> The newly assigned rate will be striked through in the rates check list to the right
- HINT**: It is possible to assign a rate to more than one cost/service type
5. To enable immediate change, please carry out a system reset:
 - a. Click the cog icon at the top-right corner of the page and click **“Reset”**
6. => Your user is logged out and logged in again and your changes take immediate effect.

How can I assign permissions to roles?

General information

- To assign specific permissions to a role, you first have to create the role [in “Admin”](#)
- **HINT**: the roles should be created according to a permissions hierarchy (see [the respective use case on roles](#) for more information) – this will facilitate permissions administration as the most powerful roles will be displayed in the right-most column, with the least powerful roles in the left-most column.

Steps

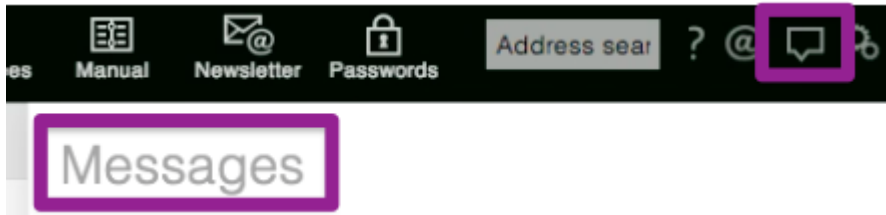
1. Go to “**Admin**” > “**Permissions**”
2. Click the “>> **select** <<” dropdown
=> all activated **TEAMBOX** modules are displayed
3. Click the module you want to define permissions for, e.g. “**Activities**”
=> all the active roles are displayed (horizontally) as well as all permission options (vertically)
4. Check the boxes according to your permissions structure (e.g. permission “**Resource Planning**” only checked for specific roles)
=> **HINT**: blue check marks  indicate specifically/manually checked permissions (e.g. “>> **all** <<”), greyed-out checks  indicate that for this role, all permissions have been assigned or that all roles have been assigned these permissions
5. Once you’re finished assigning permissions, click “**Save**”
=> The permissions have been assigned to the role(s).

Settings Services admin Permissions Advertising Materials Messages						
<div> <div>Finances</div> <div> <div>least</div> <div>most</div> </div> <div>permissions permissions</div> </div>						
»all«	Kreation	Beratung	Finanzbe...	Administ...	Geschäft...	
»all«	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Estimates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Create and edit estimate	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Finalize estimate	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Edit finalized estimate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Approve estimate	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Copy/delete template	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Incoming invoices	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Create and edit invoice	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Edit basis data	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Finalize invoice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Edit finalized invoice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Set invoice to paid	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Where can I change notification settings for “Messages”?

General information

“**Messages**” is an optional module and can be accessed by clicking the speech bubble symbol in the main navigation:



New, user-specific messages are created when certain *TEAMBOX* events trigger notification (to see the full list of triggering events follow the “**Steps**”_ *below*). **Messages have different priorities which can be assigned to events (see _“Steps” below):**

- “**high**”: highly prioritized messages are displayed as pop-ups throughout the *TEAMBOX* (e.g. time-tracking reminder), are added to a user’s Messages ‘blog’, highlighted and flagged (i.e. star icon) and will always stay in the top section of the list unless the flag is removed (i.e. star icon is clicked)
- “**middle**”: these messages are added to a user’s Messages ‘blog’, highlighted and flagged (i.e. star icon) and will always stay in the top section of the list unless the flag is removed (i.e. star icon is clicked)
- “**low**”: low priority messages are added to a user’s Messages ‘blog’ without highlighting and are gradually moved to the “**Change log**”

Steps

1. Go to “**Admin**” > “**Messages**”
2. To change the notification settings for specific roles, click the “**Filter settings**” dropdown and choose the role (or select “**Default**” to define standard settings for all users)
 - a. **HINT**: the events which trigger notification are displayed below and grouped per module
3. Expand the module of your choice (e.g. “**Activities**”) and assign message priorities per event (e.g. change priority to “**high**” for “**A work package is ... created**”)
4. Once you’re finished, click ‘**Save**’




=> The notification settings have been saved for the selected role(s).




PLEASE NOTE: in “**Admin**” > “**Messages**”, you can also up the priority for “**Finances**” > ... to trigger confirmation by another person for a financial document/process (e.g. an outgoing invoice)




Manual Newsletter Passwords Address search ? @ 9




Messages




You have 9 flagged messages. [Remove flag](#)




Bernd Muster hat die Rechnung [#1264](#) intern bestätigt.   
Wartung Homepage (Daimler) | Wed, 31. May 17 15:5




Martin Reitbauer hat die Rechnung [#1257](#) zur Bestätigung vorgelegt.   
Audi tv spot (Manner) | Tue, 02. May 17 14:23



Benjamin Gottschalk hat den [Meilenstein](#) ["Beauftragung Druck"](#) geändert.   
Sommeraktion 2017 (Daimler) | Thu, 20. Apr 17 11:49




Benjamin Gottschalk hat den [Meilenstein](#) ["Beauftragung Druck"](#) geändert.   
Sommeraktion 2017 (Daimler) | Thu, 20. Apr 17 11:49




Benjamin Gottschalk hat den [Meilenstein](#) ["Beauftragung Druck"](#) geändert.   
Sommeraktion 2017 (Daimler) | Thu, 20. Apr 17 11:49

Benjamin Gottschalk hat den [Meilenstein](#) ["Beauftragung Druck"](#) geändert.   
Sommeraktion 2017 (Daimler) | Thu, 20. Apr 17 11:49

Martin Reitbauer hat den [Meilenstein](#) ["Recherche"](#) geändert.   
Industrie (Manner) | Fri, 02. Jun 17 09:00

Martin Reitbauer hat die [Aufgabe](#) ["kunde anrufen"](#) angelegt.   
Industrie (Manner) | Fri, 02. Jun 17 09:00

Martin Reitbauer hat die [Aufgabe](#) ["kontrolle"](#) angelegt.   
Industrie (Manner) | Fri, 02. Jun 17 09:00

Benjamin Gottschalk hat das [Arbeitspaket](#) ["Ausarbeitung mit beiden Teams"](#) erledigt.   

Refresh Settings **Change log**

MAILBOX

In this section, you will find information on the following topics:

- [How are emails displayed in TEAMBOX?](#)
- [How can I look for emails?](#)
- [What features does "Mailbox" offer?](#)

How are emails displayed in TEAMBOX?


General info

- Whenever you send an email with the *TEAMBOX* mail address in blind copy (bcc), these emails are displayed in the *TEAMBOX* mailbox tool



- Whenever you browse linked content in *TEAMBOX*, with “**Mailbox**” opened, “**Mailbox**” will automatically display any linked mails once a linked entity has been recognized.
- Per default, “**Mailbox**” will be displayed as flexible panel that disappears when clicking the arrow icon on the right side; choose “**View docked**” from the “**Mailbox**” options to switch to integrated view



- Clicking  lets you choose between **“Compact view”** (minimal detail), **“Standard view”** (advanced detail) and **“Complete view”** (full email contents)
- Clicking **“All mails”** will give you filtering options to view specific emails filtered by category as well as linked and unlinked emails
 - **Emails can be linked to clients, areas and jobs, work packages and tasks, cost estimates and invoices**
 - **Manually linked emails:** With **“Mailbox”** open, browse e.g. **“Activities”** and select the relevant activity; if a suitable email exists, **“Mailbox”** will view the link **“Link with ...”** for this email => click it to link this email with this activity
 - **Automatically linked emails:** If e.g. a contact is an existing *TEAMBOX* contact, the system will automatically link this email with this contact. When browsing *TEAMBOX*, with **“Mailbox”** open, the system will automatically display linked emails whenever an existing contact with existing emails has been detected.

HINT: You can also link emails to specific entities by browsing these (e.g. a specific activity) and then clicking **“New mail”** in **“Mailbox”**; this will open your local mail client and add the relevant tags to the email ‘subject’ which, after sending, will result in this email being linked to the selected activity

How can I look for emails?

Steps



1. Click the three-lined icon and choose the relevant search option (e.g. **“Search everything“**, **“Search for a person“** or **“Search for attachments“**)
2. In the search field, enter the search term (e.g. client name)
=> **“Mailbox“** will automatically display all search-relevant emails

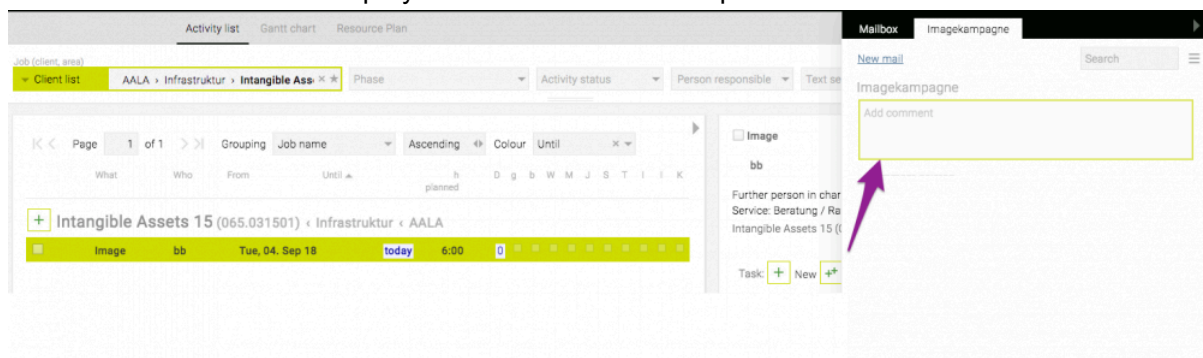
What features does “Mailbox” offer?

General

- “Mailbox” is integrated as a side bar (right-hand side of the window)
- It comes with detailed filter options (e.g. filter for **“Only mails”**, **“Mails from external contacts”**, **“Unlinked mails”** etc.)
- The **‘comment’** feature can be used for internal communication (e.g. to exchange to-the-point, content-specific internal information) and for creating and using individual reminders for these specific items.

Adding a new internal comment

1. Open the mailbox slider
 2. Click on some content (e.g. activity / task)
- => The mail sidebar will display an **“Add comment”** input field



3. Expand the mail sidebar and add an internal comment to the field (e.g. “Call client”)
 - a. **EITHER:** Choose a **“Receiver”** from the drop-down
=> The recipient will receive a notification and may also set a reminder to deal with this notification at a later stage
 - b. **OR:** Click the **‘reminder’** icon and choose a time frame
=> The current user will receive the reminder at the chosen point in time
4. Click the green **‘check’** icon to add the comment

NOTE: A subtle grey tile symbol indicates that a comment exists for this content or that an email has been linked

