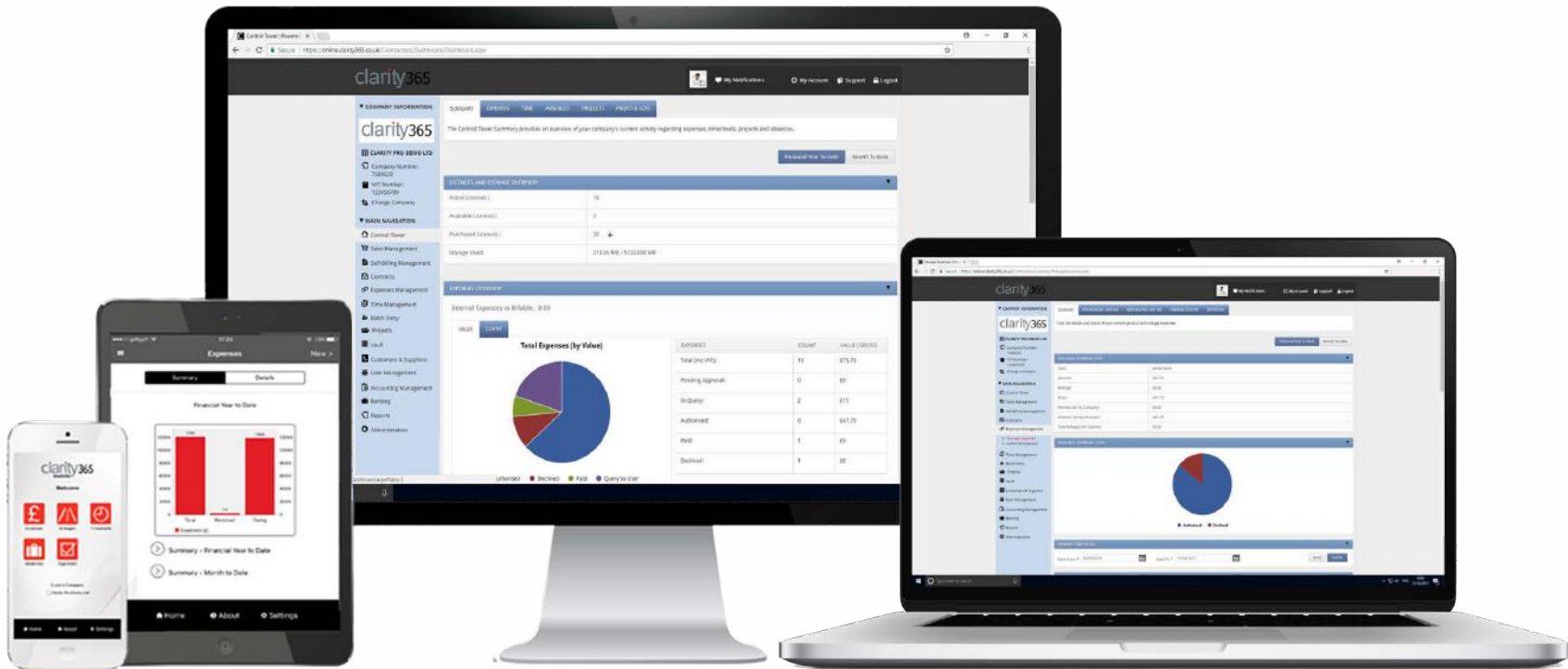


Let's Get You Started...



clarity365

support@clarity365.co.uk

+44 (0) 3333 1111 00

help.clarity365.co.uk

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1 Introduction to Clarity365

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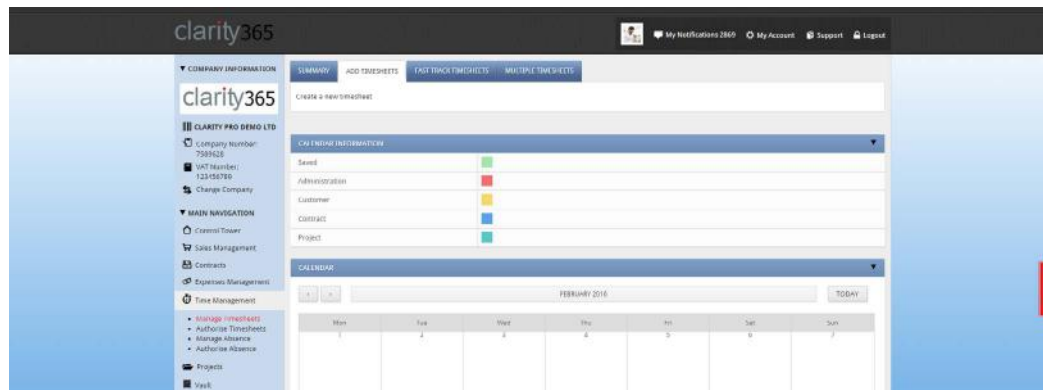
4 Adding a User

5 FAQs

- Account FAQs
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1 Introduction to Clarity365

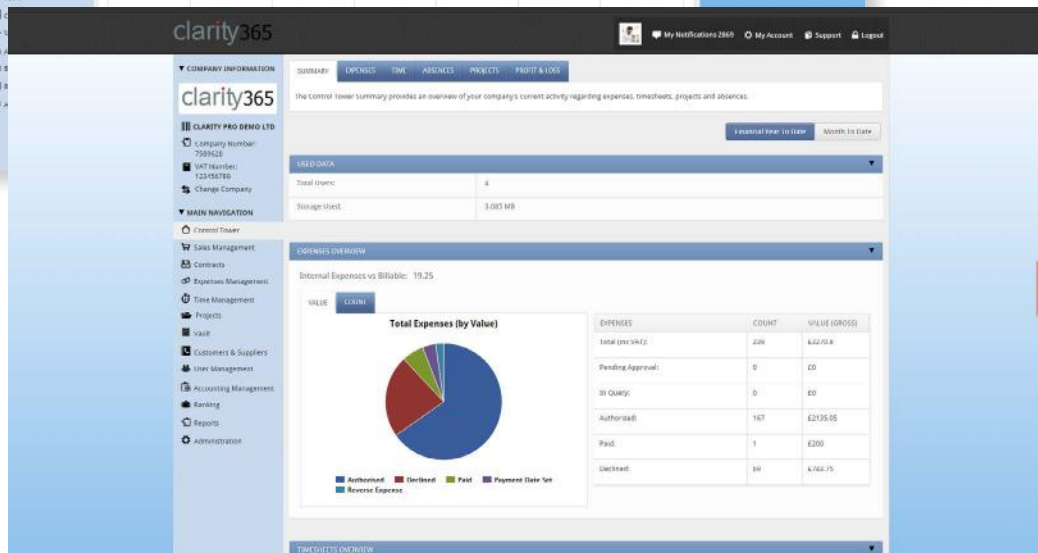
Introduction to Clarity365



Clarity365 is cloud-based business software designed to make business administration and back office processes easy.

This guide is designed to help you get started, including logging in, viewing your control tower, editing details and adding extra users.

You have already received your verification details and now it's time to log in and start managing your business processes.



With Clarity365 you can:

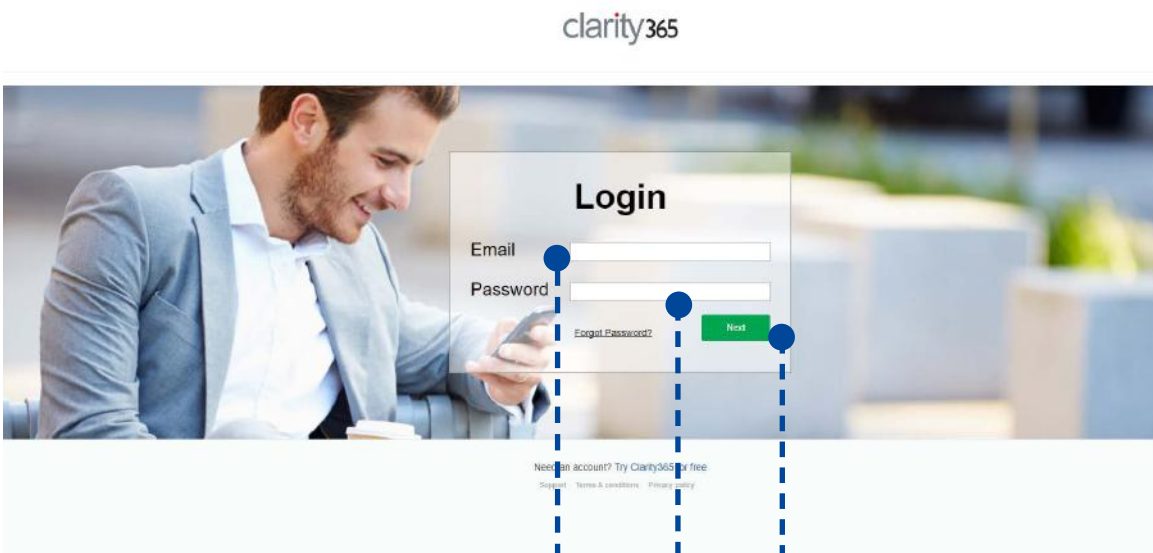
- Collaborate with users and administrators
- See an easy to understand overview of your business processes
- Report easily and quickly with minimum hassle
- Keep up to date with all that is going on with your business

And much more.

At Clarity365 we believe in providing you with help and support wherever we can to ensure your business runs as efficiently as possible. If you have a question or are stuck using the system just [contact our team by clicking here](#) and we'll get back to you as soon as possible.

Logging In

Clarity365 uses 256-bit data encryption, double that of online banking. Your data is stored in secure UK data centres, so you know your data will be safe with us.



2 Enter the e-mail you used to sign up

3 Enter your password

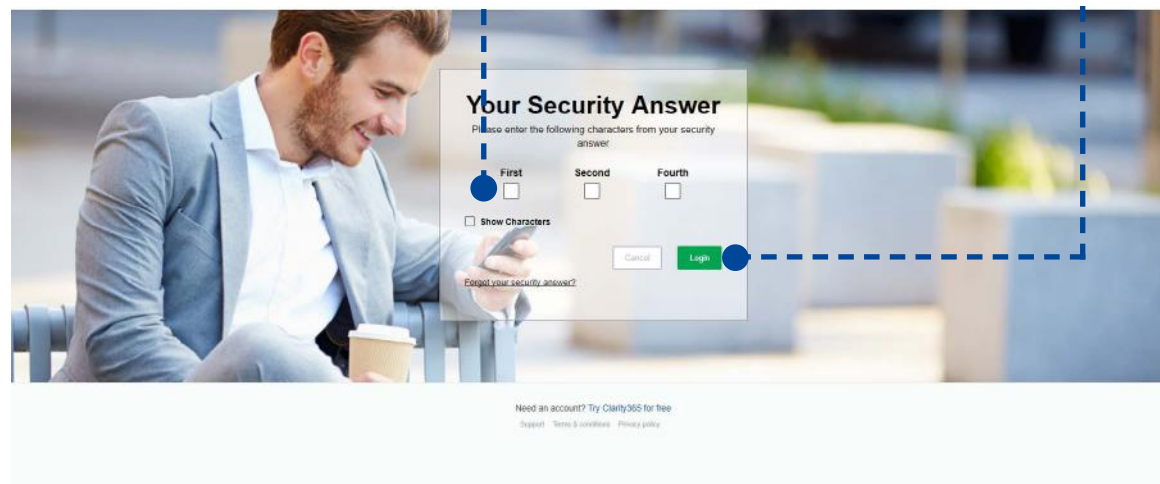
4 Click 'Next'

1 Go to the **Clarity365 website** and click 'Login'

5 Enter 3 characters from your security answer

Click 'Login'

6



2 Navigation & Control Tower

The Control Tower

The Control Tower is your real-time hub, providing you with full visibility into your company finances.

1 Use these tabs to see a more detailed view of each module's data

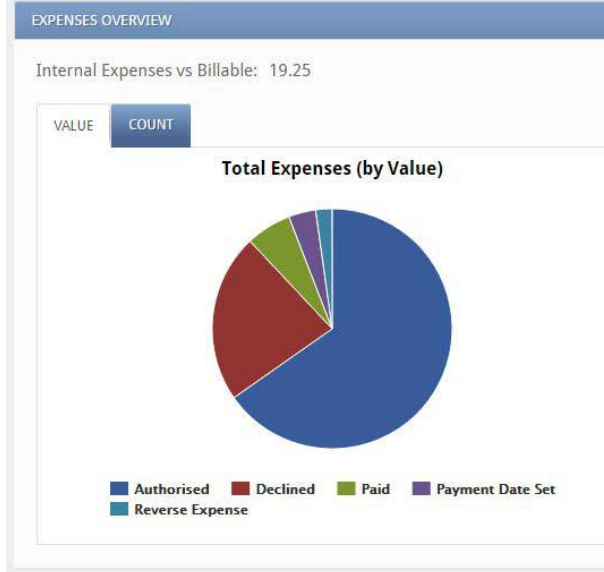
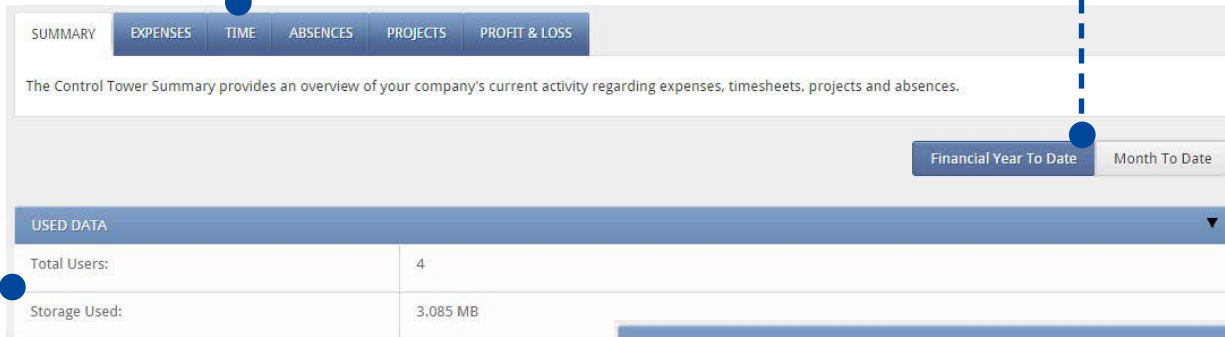
2 Use these tabs to see data by Financial Year or Month To Date

5 Chart detailing real-time data on each module

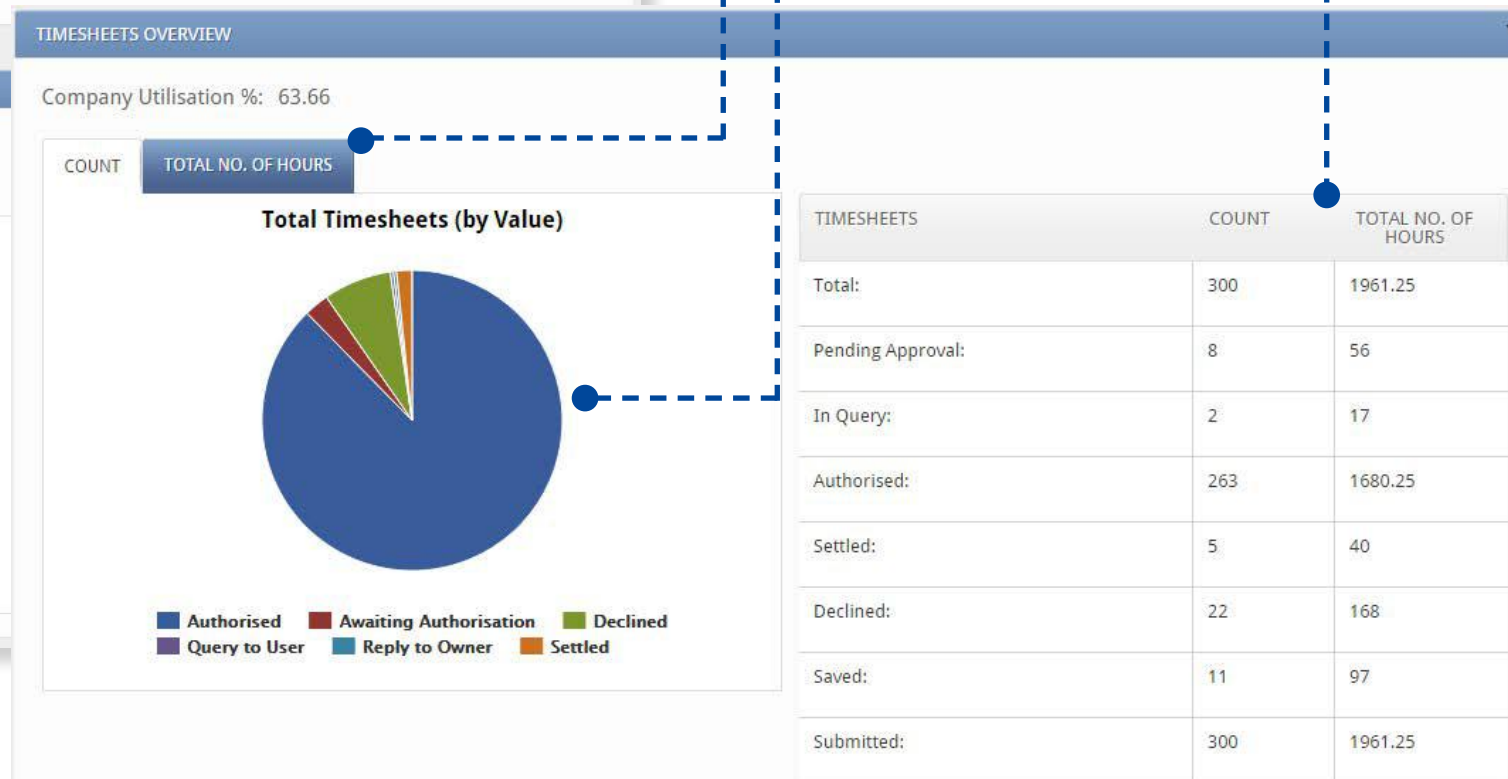
4 The tabs under each section overview can be used to see data such as total no. of hours or total expense claims

Table showing important data for each module

6




3 Here you can see your company's total number of users & amount of storage used



Navigation

The navigation menus expand showing you each sub section allowing you to move around the system quickly and efficiently

Company Information Menu



▼ COMPANY INFORMATION

clarity365

CLARITY PRO DEMO LTD

Company Number: 7589628

VAT Number: 123456789


Change Company

1 Your company logo you upload will show here

2 Your company name, number and VAT number (if applicable) will show here.

3 If you have more than one company in Clarity365, click here to switch between them

Top Navigation Menu



9 Your profile picture shows here

10 Access your account details here

12 Click here to log out securely

8 You can access your notifications here

11 Visit our [Help Site](#) & get [support](#) here

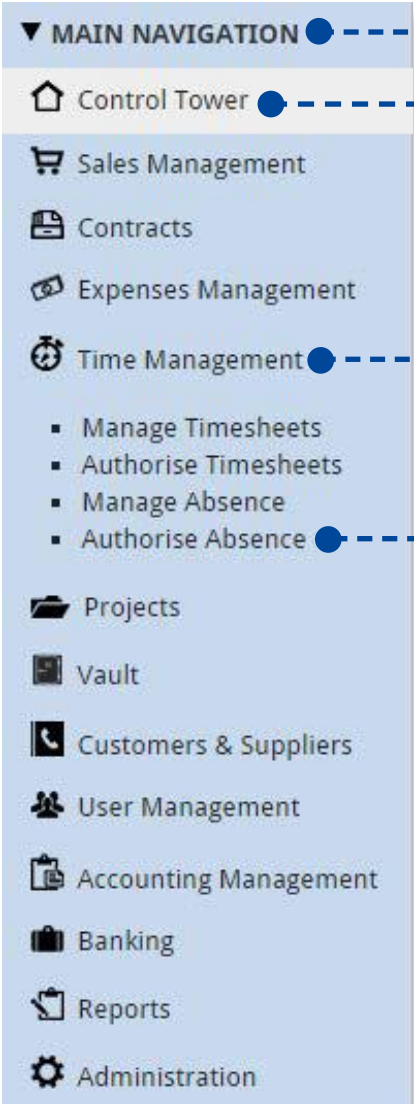
My Notifications 17

My Account

Support

Logout

Main Navigation Menu



▼ MAIN NAVIGATION

Control Tower

Sales Management

Contracts

Expenses Management

Time Management

- Manage Timesheets
- Authorise Timesheets
- Manage Absence
- Authorise Absence

Projects

Vault

Customers & Suppliers

User Management

Accounting Management

Banking

Reports

Administration

4 Use the main navigation to move to different modules

5 The module you are in will highlight grey

6 Select a module from the side bar

7 Sub menus will appear underneath (if applicable)

Modules Explained

Clarity365 has thirteen main modules to use. Depending on your version and permissions, you may not have access to some of these modules.



Control Tower

The control tower is a real-time overview of your business. [Find out more here.](#)



Sales Management (Pro)

Create invoices, quotes and purchase orders. You can also send client billable items for approval.



External Approval (Enterprise)

Send billable timesheets and expenses to clients for approval from this module.



Contracts

Keep a record of all your legally binding contracts with customers. Create them here so users can assign expenses and time to them.



Expenses Management

Users can add general and mileage expenses here. Owners/ managers can also approve, query or decline expenses from this tab.



Time Management

Users can add timesheets here. Owners/ managers can also approve, query or decline expenses from this tab.



Projects

Create and manage internal and customer projects here to keep track of costs. Users can then assign expenses or time to the project.



Vault

Store important documents here and be reminded of the renewal and end dates.



Customers and Suppliers

Add and manage customers and suppliers here so users can assign time or expenses.



User Management

Add and manage extra users here. Please contact your account manager for costs associated to your plan.



Accounting Management

Manage your VAT and exchange rates here. With a pro description you can manage recurring expenses, loans, assets & more here.



Banking (Pro)

Add and manage your company bank accounts



Reports

Generate simple, actionable business reports in the click of a button here.



Administration

Manage your company's details, settings and departments here. Additional Modules can be activated, including: [Batch Entry](#) and [Self Billing](#).

3 Editing your Company Details

Editing Company Details

When you first enter Clarity365 the company details will be filled in with data so you can get started. You will need to change these to your company details.

1 Select 'Administration' from the main navigation

2 Click 'Edit Company Details'

3 Enter your Business Details

COMPANY INFORMATION

clarity365

CLARITY PRO DEMO LTD

Company Number: 7589628

VAT Number: 123456789

Change Company

MAIN NAVIGATION

- Control Tower
- Sales Management
- Contracts
- Expenses Management
- Time Management
- Projects
- Vault
- Customers & Suppliers
- User Management
- Accounting Management
- Banking
- Reports
- Administration

COMPANY DETAILS | DEFAULT SETTINGS | DEPARTMENTS | NOTIFICATIONS | GL CODES | SUBSCRIPTION SETTINGS

Welcome to the Administration module. You will find your company details on this page. You can add a new company or edit your existing company details at any time.

[Add New Company](#) [Edit Company Details](#)

BUSINESS FILES

clarity365

ADDITIONAL INFORMATION

Business Type:	Limited Company
Business Name:	Clarity Pro Demo Ltd
Business Description:	Tell us what your business does
Date of Incorporation:	15/01/2010
Business Number:	7589628
Director's DOB:	
Director's NI:	
Corporation TAX Reference:	

BUSINESS DETAILS

Business Name: *	Clarity Pro Demo Ltd
Type of Business: *	Limited Company
Company Number: *	7589628
Date of Incorporation: *	15/01/2010
Business Description: *	Tell us what your business does

4 Enter additional information such as a SIC Code & Fiscal Start Date

ADDITIONAL INFORMATION

Business Website:	www.clarity365.co.uk
Director's NI:	
Director's Date of Birth:	Director's Date of Birth:
SIC Code: *	Other service activities
Fiscal Start Date: *	01/10/2015
Annual Tax Return Due Date: *	28/10/2016
Business TAX Reference:	Business TAX Reference:
Business PAYE Reference:	Business PAYE Reference:
Public Liability Insurance:	

5 Upload a company logo and certificates

Click 'Save' to save your changes

6

FILES

Upload Business Logo:	Choose File No file chosen	Valid formats: doc,pdf,jpg,jpe,jpeg,png,gif,tiff <input type="checkbox"/> Delete file from storage/queue
Company Inc. Certificate:	Choose File No file chosen	Valid formats: doc,pdf,jpg,jpe,jpeg,png,gif,tiff
Public Liability Insurance:	Choose File No file chosen	Valid formats: doc,pdf,jpg,jpe,jpeg,png,gif,tiff

[Cancel](#) [Save](#)

4 Adding a New User

Adding a User

Adding new users into Clarity365 is easy. Follow the steps below to add a new user. Remember, you pay your subscription per user.

1 Click 'User Management' and then 'User Setup'

3 Click the 'New User' tab

▼ COMPANY INFORMATION

clarity365

CLARITY PRO DEMO LTD

Company Number: 7589628

VAT Number: 123456789

Change Company

▼ MAIN NAVIGATION

- Control Tower
- Sales Management
- Contracts
- Expenses Management
- Time Management
- Projects
- Vault
- Customers & Suppliers
- User Management
 - User Setup
- Accounting Management
- Banking
- Reports
- Administration

SUMMARY NEW USER NEW ACCOUNTANT

View your current users and manage their role and permissions

USERS DATA TABLE

	FIRST NAME	LAST NAME	ROLE	EMAIL	LAST LOGGED IN	PASSWORD CHANGED	DATE CREATED	DEPARTMENT	STATE
	James	Rook	Business Owner	pro.owner1@claritydemo.co.uk	12/02/2016	28/10/2015	28/10/2015 12:19:36	No Department	Active
	Jane	Lewis	Manager	pro.manager3@claritydemo.co.uk	10/02/2016	16/12/2015	28/10/2015 12:26:05	IT Department	Active
	Lucy	Poole	Additional User	pro.user3@claritydemo.co.uk	11/02/2016	28/10/2015	28/10/2015 12:30:21	IT Department	Active
	Joe	Williams	Additional User	sales@clarity365.co.uk	05/02/2016	13/11/2015	13/11/2015 12:54:34	No Department	Active

2 To edit an existing user click the 'Edit' icon

4 Enter some basic information about the user

5 Enter a contact number and valid email address (This is the address their registration email will be sent to)

USER DETAILS EXTRA DETAILS CHARGE RATES MILEAGE RATES ABSENCE SETTINGS

Enter your users main contact details here. Make sure the email you have entered is correct as this will be the email their registration link is sent to.

*To add extra details such as charge rates and mileage rates click 'Yes' next to Add Extra Details.
* Indicates mandatory fields*

USER DETAILS

Title: *

First Name: *

Last Name: *

Contact Number: *

Email: *

Department:

Add Extra Details: ☒ Yes ☐ No

Cancel Clear Save

6 Click 'Extra Details' when all User details are complete

Adding a User Continued

Adding new users into Clarity365 is easy. Follow the steps below to add a new user. Remember, you pay your subscription per user.

The screenshot shows the 'USER EXTRA DETAILS' and 'ADDRESS DETAILS' sections of the Clarity365 user setup form. A vertical dashed line separates the two sections. Numbered callouts point to specific fields: 7 points to the 'Job Title' field; 8 points to the 'Assign to all Customers' checkbox; 9 points to the 'Use Lookup' checkbox and the map; 10 points to the 'Charge Rates' tab at the bottom.

7 Enter extra details like the user's start date and job title

8 Tick the box to assign to all customers or untick to assign them separately

9 Add the user's address details if known

10 Click 'Charge Rates' when all User details are complete

Adding a User Continued

Adding new users into Clarity365 is easy. Follow the steps below to add a new user. Remember, you pay your subscription per user.

11 Enter the charge in rates for the user

USER DETAILS EXTRA DETAILS **CHARGE RATES** MILEAGE RATES ABSENCE SETTINGS

Enter your users charge rates here. Your company's default charge rates have been automatically pulled through for you.

*Charge in rates refer to the rate employees are paid for internal work.
Charge out rates refer to what your customer would be charged for the employees work.
* Indicates mandatory fields*

CHARGE RATES SETTINGS

Working Days: ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☐ Sat ☐ Sun

Start Time: * 08:45

End Time: * 16:45

Default Break Duration: * 30 mins

CHARGE IN SETTINGS

Billing Type: * Hourly Billing Rate (£)

Billing Rate (£): * 10.00

Weekday Overtime Rate (Multiplier): * 1.00

Saturday Overtime Rate (Multiplier): * 1.00

Sunday Overtime Rate (Multiplier): * 1.00

Bank Holiday Overtime Rate (Multiplier): * 1.00

CHARGE OUT SETTINGS

Billing Type: * Prof. Daily Billing Rate (£)

Hourly Billing Rate (£): * 10.00

Professional Daily Billing Rate (£): * 20.00

Weekday Overtime Rate (Multiplier): * 1.00

Saturday Overtime Rate (Multiplier): * 1.00

Sunday Overtime Rate (Multiplier): * 1.00

Bank Holiday Overtime Rate (Multiplier): * 1.00

Cancel Clear Save

12 Enter the charge in rates for the user

15 Add mileage rates for the user, or leave the HMRC values

USER DETAILS EXTRA DETAILS CHARGE RATES **MILEAGE RATES** ABSENCE SETTINGS

Add the users mileage rates. To assign them to a specific vehicle choose it from the drop down box. Specific vehicle rates are automatically assigned from HMRC.

** Indicates mandatory fields*

MILEAGE SETTINGS

Mileage Claim Type: No Vehicle Specification

TYPE OF VEHICLE	FIRST 10,000 MILES	ABOVE 10,000 MILES
Car or Van:*	0.45	0.25
Motorcycle:*	0.24	0.24
Cycle:*	0.20	0.20

16 Click 'Absence Settings' when all User details are complete

13 Enter the charge out rates for the user

14 Click 'Mileage Rates' when all User details are complete

USER DETAILS EXTRA DETAILS CHARGE RATES MILEAGE RATES **ABSENCE SETTINGS**

Enter the users absence settings such as amount of holiday entitlement per year and annual leave start and end date. You can also set up a sickness flag to warn you when the user has had a large amount of sick days.

** Indicates mandatory fields*

ABSENCE SETTINGS

Holidays Entitlement: * 25

Disabled: * ☒

Bank Holidays: * 8

Sickness Flag: * 10

Annual Leave Start Date: * 28/10/2015

Annual Leave End Date: * 28/10/2016

Cancel Clear Save

17 Enter the user's absence details

Click 'Save'

18

5 FAQs

Q

How do I change my account details?

A

Go to the top navigation menu and click 'My Account'. You will be taken to your account settings page. Click 'Edit Details' on the right hand side to change your personal details.

Q

How do I change my password?

A

Go to the top navigation menu and click 'My Account'. You will be taken to your account settings page. Click 'Change Security Details'. Enter your current password and a new password. Enter your new password again to confirm.

Q

I've forgotten my password. What should I do?

A

If you have forgotten your password, don't panic. Simply click 'Forgot Password' on the login screen. Enter your account email and the human verification code and you will be sent a link to reset your password.

Q

I didn't receive a password reset email. What should I do?

A

If you don't receive an email after you have filled in the forgotten password form, please check your spam and junk folders and double check you entered the email your account is registered with. If you still can't find the email please [contact support](#).

Q

Where can I find my notifications?

A

Your notifications can be viewed by clicking 'My Notifications' on the top navigation menu. Click on 'View Notifications' to see all your notifications in detail.

Q

How do I know I've received a notification?

A

When you receive a notification a number will appear next to 'My Notifications' on the top navigation menu. This will increase with every notification you receive until you dismiss them.

Q

How do I log out of my account?

A

To log out of your account, click 'Logout' on the top navigation menu. You will then be signed out of your account securely.

Q What is a module?

A A module is what we call the various sections or functions of Clarity365, e.g. timesheets, absence, expenses. All modules available in your version are listed on the Main Navigation menu.

Q What is a user?

A We define a user as anyone with a secure log in to Clarity365. This could be an employee entering timesheets or a manager approving them.

Q How do I add a new user?

A [Click here to find out how to add a new user.](#)

Q What is the difference between an Additional User, Manager and Owner?

A We currently have 3 different permission levels in Clarity365. The owner is the person who initially registers with Clarity365 and has full visibility. Managers can be created for departments to authorise users items. Additional users can simply add timesheets and expenses.

Q How do I create a department?

A To create a department, click on 'Administration' on the Main Navigation menu. Then choose the departments tab. Here you can create a new department and manage existing ones.

Q How do I assign a user to a department?

A When **adding a user** you will be able to select a department to assign them to from a drop down box before clicking 'Save'.

Q How do I promote/ demote a user?

A Go to 'User Management' then 'User Setup' and choose the user to promote/ demote. Scroll down to the bottom of the form where you will see Manage Role. Simply select the role from the drop down box before clicking 'Save'.

Q I still have questions about Clarity365

A If you still have questions about using Clarity365, please visit the [Clarity365 Help Site](#) to see if you can find an answer. If you can't find an answer [contact our support team here](#).