




## Setting up Docketbook for the first time

This is a step by step guide for Administrators for setting Docketbook up. A couple of these items may already be done for you by the onboarding team. For some of the below items, a link will be available to a detailed guide for that section.

### ❑ Sign up to Docketbook


- Sign up here: <https://login.docketbook.com.au/signup>
- You can read some information about Docketbook before continuing setup:

 Guide: The Basics of Docketbook: <https://docketbook.zendesk.com/hc/en-us/articles/360052044933-The-basics-of-Docketbook>

- Log into Docketbook

### ❑ Set up general company details


- In Settings, go to General and enter your ABN, Logo, Timezone and company Address

 Guide: General Company Settings: <https://docketbook.zendesk.com/hc/en-us/articles/360049145594-Configuring-General-Company-Settings>

### ❑ Set up resources

In Settings, go to General and enter your ABN, Logo, Timezone and company Address

- In Settings, there are Resources, Resource Categories and Units of Measure sections. These work together to define your docket line items that should correspond to your invoice line items.
- Enter the Units of Measure you need (there are already some standard ones loaded, e.g. Hours), your Resource Categories and your Resources (in that order). If you want to delete any, do it in the reverse order (Resources, Resource Categories, Units of Measure).

 Guide: Managing Resources: <https://docketbook.zendesk.com/hc/en-us/sections/360006887493-Managing-Resources-Products->

## ❑ Set up a docket template

Note: For information on how operators create docket on the mobile app, see training pack for Operators

- Set up your Docket Template by navigating to Settings, Docket Templates



Guide (you will need to use the guide): Docket Templates:

<https://docketbook.zendesk.com/hc/en-us/sections/360008857953-Docket-Templates>

## ❑ Invite your team members

- In Settings, go to Members and invite your team to Docketbook (the “My Work” role is appropriate for operators)



Guide: Managing Member Users: <https://docketbook.zendesk.com/hc/en-us/articles/360041943733-Managing-Members-Users->

## ❑ Add your customer contacts

- Back out of company Settings, go to Contacts and add your Customer contacts



Guide: Adding a Contact: <https://docketbook.zendesk.com/hc/en-us/articles/360041604634-Adding-a-Contact>

- Note adding Contacts will work differently if you are using the Xero integration. If you are using the Xero integration, use this Guide to add customer Contacts:

<https://docketbook.zendesk.com/hc/en-us/sections/360008840813-Xero-Integration>