

Quick Start Guide

START YOUR JOURNEY WITH OUR USER-FRIENDLY SET-UP GUIDE.

1*

Create a Project

Click on the “Create Project” button in the Project module, update the Account (client) Name, add a Project Title and Description. *Voila!* Project created! Later on, you can add more details like budget amount, estimated hours, start and end dates.



2*

Track Time

Select an account, project, and task then use timers, daily or weekly timesheets to organize your hours. If you are tracking hourly billable goals, you’ll see your progress in the widgets at the top of your screen. We’ve included pre-built tasks to speed up the process or you can add tasks via admin/tasks/create a task.



3*

Add Users

Invite your co-workers, contractors and partners to your Dinvy Ascent workspace. To add a user, you will need to enter contact information, select a role*, and include hourly cost and billing rates. You can also include daily and weekly billable goals.

**We offer plenty of role options to ensure your team has the appropriate permission level and access, while keeping the system secure for you and clutter-free for them!*



4*

Track Progress

Keep tabs on project progress with Account, Project and Homescreen Dashboards. At a glance, you’ll be able to see margin, budget, hours, and deadlines. The more data you invest into Dinvy Ascent, the more insight it will return.



FROM HERE, YOU GET TO CHOOSE YOUR OWN ADVENTURE.

5*

Send Invoices

Transfer hours directly to an invoice or bill projects as a flat fee. Take it a step further, with your desired billing frequency. You can also organize project billing contacts and export invoices into PDF or .csv files.



6*

Generate Reports

Create reports across modules and fields. Simply select the objects you’d like to use (ie. projects, timesheets, invoices), the fields you want to include and generate your report. Once created, you can schedule reports to be delivered to your inbox.



7*

Customize Your Process

Take control of your business process with Admin control. Enable system wide policies and integrate Dinvy Ascent into your ecosystem with open APIs and the ability to create custom Webhooks.



8*

Continue your journey with advanced features (coming soon!)

When you’re ready to level up, we’re ready to help. Your business can grow, change, and adapt with our customized and tailorable software solutions.

Check out our roadmap for details on future upgrades and learn more about our next level of products: Dinvy Alpine & Dinvy Summit!

