Sync It

Quickstart Guide for General Users

Download the app

1. Download Sync It from the app store

Set a password

1. Your manager will create an account on Sync It for you, when they do you will receive an email with a link to set your password
2. Download the app before clicking the password reset link
3. If the link takes you to a browser
    a. Set your password on the browser
    b. Open the app and login with your email and password
    c. You should primarily use the mobile app, not the web app on your browser

User settings (click your initials in the top left or under the menu on the top right)

1. Set your personal information
    a. Unless your manager specifically asks for DOB and driver's license info, there is no need to provide this information
2. Notifications
    a. You should enable notifications
    b. Messaging notifications – receive a notification when a new post is uploaded to a channel you are part of. Your company can use this instead of group texts for company communications
    c. Equipment notifications – you only need this if you want notification about overdue servicing. If you want equipment notifications you also need to go to the equipment tab and select notifications for each piece of equipment you want notifications for
    d. Payroll – your manager will run payroll with "Certified" timecard information. Payroll notifications will send you a notification if you have not certified your time cards.
    e. Unless you have admin permissions, you cannot change the team.
    f. Click Update to save your changes.

Timecards (Bottom tab)

1. You can clock in, clock out, fix timecards and add timecards from this page.
2. The only timecards initially displayed are from today.
3. Click "Certify timecards" to show all the timecards for an applicable pay period.

4. When the pay period is complete, you should check your timecards for accuracy, check the total time for accuracy and click "Certify Timecard".
5. If you certify your timecard after the pay period is over (i.e. Sunday when the period ended on Saturday), you will need to select "Last pay period"

Checklists (bottom tab)

1. If you have checklists due, this tab will be yellow
2. Select your checklist and complete the steps
3. Hit complete when done
4. You do not have to complete all the steps, your manager will receive a report of unaccomplished steps
5. You may add notes to pass info to your manager

Receipts (bottom tab)

1. If you need to upload receipts, simply capture, or upload, a receipt. You can check which receipts you have successfully uploaded by looking for it in the Last 5 receipts sections
2. There is a minor issue with Sync It. Occasionally, capturing a receipt doesn't work. In this case, take a picture of the receipt directly from your camera and "Upload" it in Sync It

Messaging

1. This works similar to other messaging apps. You can create a channel, add users, delete the channel
2. Users with Admin privileges can see all channels regardless of being assigned

Equipment

1. Use this tab to view equipment and servicing information

Menu bar

1. The menu bar has less common pages
   a. Phone list – phone numbers for everyone in the company
   b. Certifications – works similar to checklists to track qualifications
   c. Project – view information about an assigned project and submit daily reports
   d. Update app – link to the app store
   e. Report issue – send an email to the developer to address issues
   f. Web app – link to the web page to use Sync It in a browser