Octayne PSA

Onboarding Toolkit

Welcome to Octayne PSA

This onboarding toolkit is your step-by-step guide to getting started with Octayne PSA. Think of it as your go-to resource for navigating the platform—whether you're setting up your first project or adding new team members. We've designed it to be simple, comprehensive, and always up to date, so you never have to wonder what comes next. While our team is always here if you need support, this toolkit is built to empower you to move confidently through the setup process, troubleshoot with ease, and reference whenever questions come up.

1. Getting Started

Sign Up & Create Your Account

Start your 30-day free trial by clicking here. Navigate to the top right and click Sign in. Fill in blank fields for **Email** and **Password**, select Agree to Terms and Services, and the select Create account. Once your account is created, you will be prompted to confirm your account via email.

Create a New Organization

Once you're signed up and have verified your email address, click + Create New Organization. Insert your organization's name along with your first and last names in the form, then click Create Organization.

Add your Logo

Navigate to the menu on the left and select Settings. Once in the **General Settings** page, click the +, select a logo from your personal files, and click open. From there, your logo will load into the space provided and will be visible on the **Navigation Menu** and across invoices.

Set Up Your First Client

To create your first client, go to the **Navigation Menu** on the left and select Clients. Then select + New Client and complete the **Create New Client** form. Once complete, select Save Client.

Set Up Your First Project

To create your first project, go to the **Navigation Menu** on the left and select Project Home. Once at the **Projects** menu, select + Create New Project, found at the top right of your screen. Once the **Create New Projects** form opens, select your newly created client from the **Client** drop down menu. Then, name your project in the **Project Name** field, provide an optional **Description** and select Create Project.

Invite Your Team

To invite team members to your organization, go to the **Navigation Menu** on the left and select Team Management. Once the **Members** menu opens, select + Invite member to organization. Fill out the invitee's **Email** in the space provided and select Invite User.

Invite Team Members to Newly Created Projects

Once members have accepted the invitation to join your team via email, you can add them to individual projects. Use the **Navigation Menu** on the left side of your screen and select the project you would like to add team members to from the Projects submenu. Then on the top right of your screen, select Settings. From the **Project Settings** menu select Members. Then click Add/Edit Members from the **Members** menu. A new **Modify Project Members** window will open with an **Organization Members** box and a **Project Members** box. Select the checkbox next to the **Organization Member** you are looking to add to the project, then select → to move that **Organizational Member** to the **Project Member** box. When you are done, simply click the × in the top right corner as changes have been reflected and updated across the platform.

Job Titles & Rates

Once members have joined your team, and have been added to your newly created project, you can begin setting up their hourly billing rates and job titles. To do so, select the project you created from the **Navigation Menu** on the left-hand side under the Projects section. Then select Settings from the top right of your screen. Then navigate to the **Project Settings** menu and select Members. From there, fill in the empty fields for **Title** and **Rate**. Once rates have been updated, you will receive a notification next to the change.

Add Billing Codes

Once members have joined your team, and have been added to your newly created project, you can begin setting up project billing codes that can be used as billing codes in your time entries. To do so, select the project you created from the **Navigation Menu** on the left-hand side under the Projects section. Then select Settings from the top right of your screen. Then select Billing Codes. From the **Billing Codes** menu, click + Add Field until all the billing codes for your project have been entered. Once complete, select Save.

Add Board Fields

Once members have joined your team, and have been added to your newly created project, you can begin setting up project board fields that will appear as columns on your organization's timesheet. To do so, select the project you created from the **Navigation Menu** on the left-hand side of your screen under the Projects section. Then select Settings from the top right of your screen. Then navigate to the **Project Settings** menu and select Board. From the Board menu, click + Add Field and fill in the blank fields for **Field Name** & **Field Type**. Once complete, select Save.

Add Timesheet & Expense Reviewers

To select Timesheet & Expense reviewers for projects, go to the **Navigation Menu** on the left side of the screen. Select a project from the Projects menu. Then, from the top right of your screen select Settings. From the **Project Settings** menu, select General and navigate towards the bottom of the screen to **Timesheet Reviewers** and **Expense Reviewers**. Select a reviewer from the Select reviewers... drop-down menu. Once reviewers are selected, click Save.

Create a Project Logo

To create a project logo, go to the **Navigation Menu** on the left side of the screen. Select a project from the Projects menu. Then, from the top right of your screen select Settings. From the **Project Settings** menu, select General and navigate towards the bottom of the screen to **Project Image**. Click the

+, select a logo from your personal files, and click open. From there, your logo will load into the space provided and will be visible on the **Navigation Menu**.

2. Track Time & Expenses

Create Your First Timesheet

To create your first time entry, select Time Ledger from the **Navigation Menu**. Then at the top right of your screen, select + New Timesheet. From the **Create New Timesheet** menu, select the appropriate **Date Range** from the Select a date range drop down menu. Then click Submit.

Create Your First Time Entry

To create your first time entry, select Time Ledger from the **Navigation Menu**. From the **Timesheet** menu, select View from the timesheet you would like to access. Once in the **Timesheet Ledger**, select + New Entry from the top left menu. Then under the **Project** column, select a project from the dropdown menu. Then under the **Billing Code** column, select a billing code from the dropdown menu. Then select the day of the week and click + ADD. From there, a **New Entry** form will appear. Complete the blank fields for **Time** and **Time Description** and then hit Submit.

How to Use Ask AI When Creating a New Entry

From the **New Entry** form, navigate to **Time Description** field. Begin writing general text about the work performed. Then select Ask AI. Begin by typing in a short form time entry into the description. Then, from the **Ask AI** menu, select **Improve Description** to get a more comprehensively worded time entry, select **Proofread** to get a review for spelling and grammatical mistakes, select **Make Shorter** to trim the **Time Description**, or select **Make Longer** to expand the **Time Description.** Once satisfied with your entry, select Submit to save.

How to Submit a Timesheet

To submit a **Timesheet**, select Time Ledger from the **Navigation Menu**. From the **Timesheet** menu, select View from the timesheet you would like to access. Once in the **Timesheet Ledger** and after you have completed entering your time for a given week, locate the Pending icon in the central navigation bar. Select the dropdown and click Submitted .

How to View Time Entries in Calendar View

To view time entries in **Calendar View**, select Time Ledger from the **Navigation Menu**. From the **Timesheet** menu, select Calendar from the slider in the top right corner.

How to Connect to Google Calendar

To connect your **Time Ledger** to your Google Calendar, select Time Ledger from the **Navigation Menu**. From the Timesheet menu, select View from the timesheet you would like to access. Once in the **Timesheet Ledger**, select the integration icon . A window will appear to the right of your screen. Select the Google Calendar Icon . Then select Connect Google Calendar. From there, follow the Google sign in instructions.

How to Connect to Microsoft Outlook Calendar

To connect your **Time Ledger** to your Microsoft Outlook Calendar, select Time Ledger from the **Navigation Menu**. From the Timesheet menu, select View from the timesheet you would like to access. Once in the **Timesheet Ledger**, select the integration icon . A window will appear to the right of your screen. Select the Microsoft Outlook Calendar Icon . Then select Connect Outlook. From there, follow the Microsoft Outlook sign in instructions.

How to Connect to JIRA

To connect your **Time Ledger** to your Atlassian JIRA Board, select Integrations from the **Navigation Menu** on the left-hand side on your screen. From the Integrations menu, click Connect on the Atlassian JIRA tile. From the Atlassian JIRA form, click Connect and follow Atlassian JIRA sign in instructions.

How to Use Note AI

To use Note AI, select Time Ledger from the **Navigation Menu**. From the **Timesheet** menu, select View from the timesheet you would like to access. Once in the **Timesheet Ledger**, select the integration icon . A window will appear to the right of your screen. From the window, select the Note AI icon . Then select the **Project** you wish to allocate your time to from the project dropdown menu. Insert your notes into the **Note** text field. Once your notes have been entered, select, Generate.

How to Create Expense Entries

To create expense entries, select Expenses from the **Navigation Menu**. From the **Expenses** menu, select + New Expense from the top right of your screen. From the New Expense Entry form, select the **Date**, **Project**, **Expense Category**, **Amount**, and **Description**. Select Choose File under **Receipt Upload** to attach a receipt. Once all forms have been updated, click Submit.

How to Submit Expense Entries

Once an expense entry has been created, navigate to the expense menu and select the dropdown menu under the **Status** column Pending. When ready to submit, select, Submitted.

3. Time & Expense Approvals

How to Review Submitted Timesheets

To review submitted timesheets, select Review Time & Expenses from the **Navigation Menu**. From the **Review Time & Expenses** Menu, select Time Entries from the top right of your screen. From the **Time Entries - Review Time & Expenses** menu, select Review for the weekly timesheet you choose to review. From there, use the **Status** column drop down menu to **Approve** or **Reject** submitted time entries.

How to Review Submitted Expenses

To review submitted timesheets, select Review Time & Expenses from the **Navigation Menu**. From the **Review Time & Expenses** Menu, select Expenses from the top right of your screen. From the **Expenses - Review Time & Expenses** menu, use the **Status** column drop down menu to **Approve** or **Reject** submitted expense entries.

4. Automated Invoicing & Billing

How to Add Billing Information to Invoices

Navigate to the menu on the left and select Settings. Once in the **General Settings** page, select Edit Information from the Billing Information box. Complete the empty fields in the **Billing Information** memo and scroll to the bottom to select Save Billing Info. Once billing information has been saved, it will be included in the footer of all company generated invoices.

How to Create New Invoices

To create new invoices, select Billing & Invoice from the **Navigation Menu**. From the **Billing & Invoices** menu, select + New Invoice from the top right corner of the screen. From the **New Invoice Generator**, select **General** and complete the required fields for **Project**, **Template**, **Invoice #**, **Invoice Date**, **Invoice Start Date** and **Invoice End Date**. Once complete, select Next. From the **Time Entries** menu, select the timesheets you wish to include in your invoice (*note that only submitted and approved timesheets will appear in this menu).* Once all time has been selected, click Next. From the **Expenses** menu, select the expenses you wish to include in your invoice (*note that only submitted and approved expenses will appear in this menu).* Once all expenses have been selected, click Next. In the **Review** menu, take a moment to review that all information in the invoice is correct. When you are ready to save the invoice and send it to the client, click Download and then click Submit Invoice.

5. Reporting & Analytics

How to Access Digital Dashboard Reporting

To access digital dashboard reporting, select a **Project** from the **Navigation Menu**. From the **Project Summary** menu select Reports. To change the date range of the digital dashboards, select Jun 20, 2025 - Jun 27, 2025 from the top right of the screen. Select a start date and end date then click Search.

How to Create Exportable Reports

To export reports, select a **Project** from the **Navigation Menu**. From the **Project Summary** menu select Reports. To change the date range of the digital dashboards, select Jun 20, 2025 - Jun 27, 2025 from the top right of the screen. Select a start date and end date then click Search. To export that report click Export Report.

How to Create Custom Exportable Reports

To export custom reports, select a **Project** from the **Navigation Menu**. From the **Project Summary** menu select Reports. From the **Data Exports** menu, select + Create new export. From the **Create New Data Export** menu, create **an Export Name**, select the **Exports Type**, and select a **Date Range**. Once all fields have been completed, click Generate.