

# Quick Setup for Administrators

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## Application Administration (Issue Tracker)

### 1. a– Create a New Binder

Binders are used to organize groups of issues. They can be used to represent Clients, Projects, or other various categories.

1. Select the Issues the main OfficeClip toolbar (bottom left).
2. Select New Binder in the Issues toolbar.
3. Edit Settings.
4. Click Create.

### 1. b – Edit Fields

OfficeClip Issue Tracker can customize fixed fields to help track more relevant information and other controls, such as, making selected fields required and which who may modify a Binder's fields.

1. Select the Issues the main OfficeClip toolbar (bottom left).
2. Select the desired Binder in the Binder List.
3. Select Admin from the Issues Toolbar.
4. Select Edit Fixed Fields within the Issues toolbar.
5. Edit Settings.
6. Click Save.

### 1. c – Add Custom Fields

Custom fields or UDFs (User Defined Fields) provides the ability to add Issue details that are not set in the Fixed Fields.

1. Select the Issues the main OfficeClip toolbar (bottom left).
2. Select the desired Binder in the Binder List.
3. Select Admin from the Issues Toolbar.
4. Select Edit Edit UDFs within the Issues toolbar.
5. Click Add New.
6. Set Options.
7. Click Add.

### 1. d – Options

The Options feature allows administrators to set the display of a specified Binder's case list.

1. Select the Issues the main OfficeClip toolbar (bottom left).
2. Select the desired Binder in the Binder List.
3. Select Admin from the Issues Toolbar.
4. Select Options within the Issues toolbar.
5. Set Options.
6. Click Save.

### 1. e –Email Capture

By setting up the email capture feature, OfficeClip Issue Tracker can be used to automatically record issues that are sent to a given email address. Example: Emails sent to "OfficeClipSupport@officeclip.com" would automatically generate a case within the respective Binder and the details for that case can be configured.

1. Select the Issues the main OfficeClip toolbar (bottom left).
2. Select the desired Binder in the Binder List.
3. Select Admin from the Issues Toolbar.
4. Select Email Capture within the Issues toolbar.
5. Enable capture of cases via email.
6. Edit Email and Case Settings.
7. Click Save.