

# Basecamp Tips

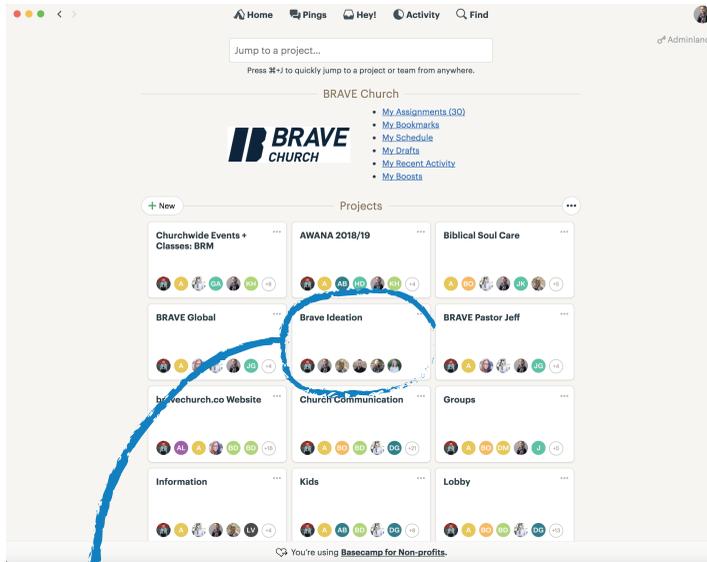
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A TwoTone Tutorial

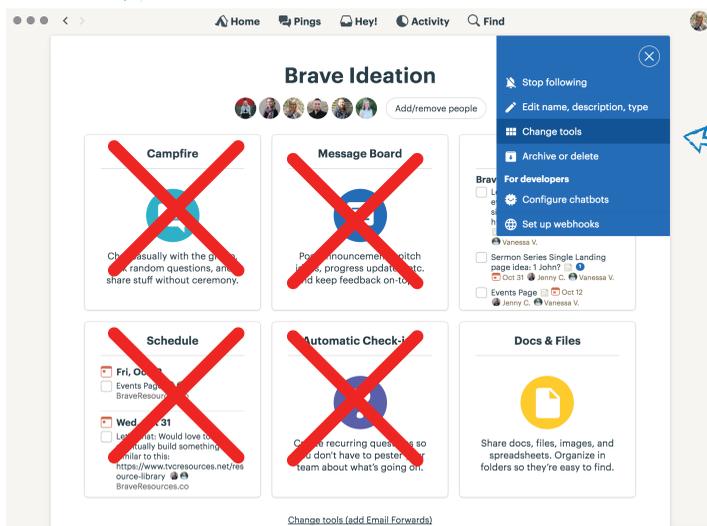
## FIRST THINGS FIRST! DOWNLOAD THE DESKTOP APP

Yes, there is an online version, but the desktop app is the best way to work. You'll be able to see when you have notifications more easily, and you won't have to worry about missing something if you accidentally close out of a window. Google "Basecamp 3 for Mac or PC" and download the free desktop app. BONUS: There's also an app for your phone if you want to stay connected on the go!

## BREAKING DOWN THE FEATURES



### CUSTOMIZE YOUR PROJECT TILE



## PROJECT TILES

Projects are a great way to divide tasks out on a high level. For example, in churches, we often divide out by ministries. One project tile could be called "Kids Ministry," for example.

Another example would be with a company that offers various services. For TwoTone, that might be:

- Web Design
- Print Design
- Copywriting

Once you've created your project tile, you'll want to customize the tools. The only two tools you'll need are "To-Dos" and "Docs & Files."

NOTE: every time you add a new project tile, be sure to add in everyone involved. People will NOT be automatically notified or added unless you do this. The following screenshots show you how to add new people to projects.

[CLICK HERE TO CHANGE TOOLS](#)

## BONUS TIP

You don't want to have too many projects. We recommend no more than 10 to keep things clean and organized.

# WHAT A PROJECT SHOULD LOOK LIKE

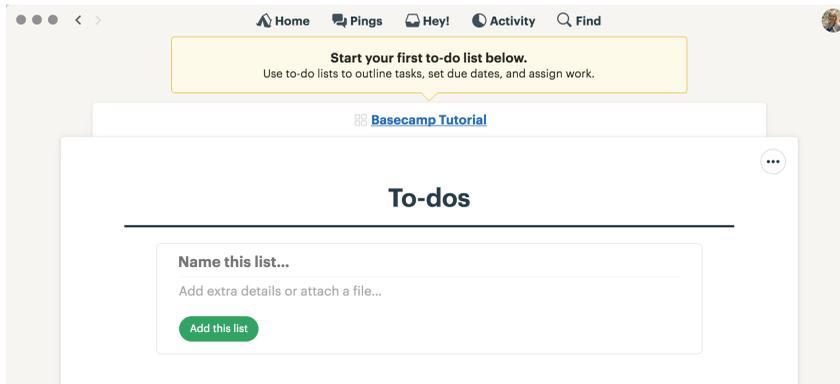
The screenshot shows a project dashboard for 'Church Communication'. At the top, there is a navigation bar with 'Home', 'Pings', 'Hey!', 'Activity', and 'Find'. Below the navigation bar, the project title 'Church Communication' is displayed. A row of circular avatars represents team members, with an 'Add/remove people' button to the right. The dashboard is divided into three main sections: 'To-dos' (305/324), 'Docs & Files', and 'Project Activity'. The 'To-dos' section includes a task for 'Physical Product Design' with a video requirement. The 'Docs & Files' section lists various documents like 'Physical Product Design Form' and 'Email Blast Communication Form'. The 'Project Activity' section shows a comment from Mike W. about a video deadline.

ADD PEOPLE TO PROJECT

The screenshot shows the 'People on the project' invitation form. At the top, there is a '+ Invite people...' button. Below it, the form asks 'Who do you want to invite?' and provides a table for entering invitee information. The table has columns for Name, Email, Title, and Company. Below the table, there is a text area for a personal note and buttons for 'Send invitations' and 'Preview the invite'. At the bottom, there is a list of existing project members with their names, photos, and contact information.

INVITE PEOPLE TO PROJECT

ADD IN NAME, EMAIL, TITLE AND COMPANY



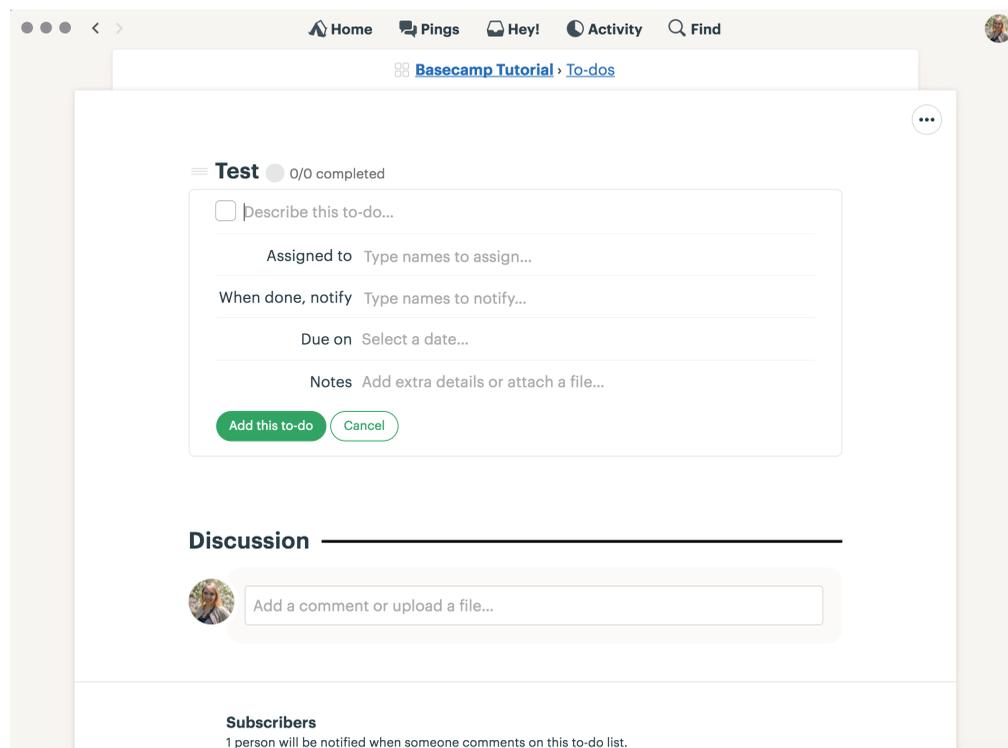
## TO-DO LISTS

Once you have your project tile, it's time to start breaking things down further. You can create Lists under To-Dos. Using our "Kids Ministry" example, a few Lists might be "Print Material" or "Volunteer Information."

## TO-DOS

Once you have your lists, it's time to start adding To-Dos! When adding a To-Do, be sure to:

- Give it a very clear name that describes the task, such as "Design New Business Cards"
- Then, assign the To-Do! In this case, you'd assign it to the TwoTone team members you're working with.
- Next, enter in who to notify when the task is complete. As the person who assigned the task, you may want to know when it's complete. You may also want to add any admins or assistants if follow up is required after the task is complete.
- Then, fill in the due date! THIS IS VERY IMPORTANT. If you leave this blank, we may not see the task, as it won't show up on our "Assignments with dates."
- Lastly, add in any relevant notes. For this example, you should include the content that you'd like on the business cards, the size of the business cards, and the number of cards you'd like printed.



Home Pings Hey! Activity Find

Church Communication

+ New list To-dos 305/326 View as...

**Physical Product Design** 0/0 completed

Add a to-do

**Video** 3/4 completed

Need to get a video done for BRM and ENG that is 2-3 min of Jeff talking to 1st time visitors at the church. Wed, Oct 17 Ryan B. Mike W.

Add a to-do

- ✓ Sermon Clips Thu, Oct 11 Ryan B. Jenny C. Abby G. Mike W.
- ✓ Need video of Jeff for Ridgeline launch service Thu, Sep 27 Ryan B.
- ✓ Let's chat on what to do with Jeff's video from Men's Ministry Thu, Sep 27 Ryan B. Mike W.

**Communication Tools** 3/3 completed - Now archive it!

Add a to-do

- ✓ One thought just had with New Communication Request process Mon, Oct 1 Jenny C. Kayla P. Vanessa V.
- ✓ Need to have a Google Doc template created for SOP's. Can use this announcement one as the first one Fri, Sep 28 Jenny C. Kayla P.
- ✓ Minor Edits to the Event Checklist Thu, Sep 27 Kavl P.

Home Pings Hey! Activity Find

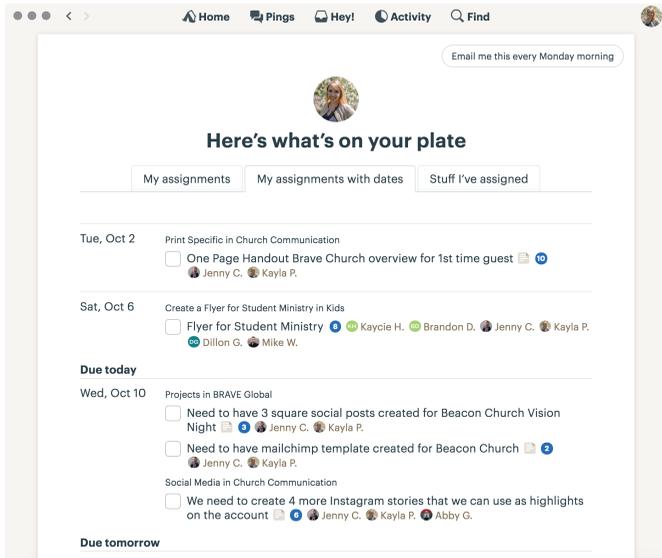
Church Communication

+ New... Docs & Files Unsorted

<p><b>Physical Product Design Communications Form</b></p> <p>Physical Product Design Communications Form</p> <p>Posting Process: Go to the Church Communications</p>	<p><b>Email Blast Communications Form</b></p> <p>Email Blast Communications Form Request</p> <p>Posting Process: Go to the Church Communications</p>	<p><b>Print Design Communications Form</b></p> <p>Print Design Communications Form Request</p> <p>Posting Process: Go to the Church Communications</p>	<p><b>New Sermon Series Communications Form</b></p> <p>New Sermon Series Communications Form</p> <p>Posting Process: Go to the Church</p>
<p><b>Social Media Request Communications Form</b></p> <p>If you are wanting to request a social post for an event, please visit the event message project.</p> <p>Posting Process: Go to the Church</p>	<p><b>Website Update Communications Form</b></p> <p>Posting Process: Go to the Website project that you are wanting to make the change to: Brave Church, Brave Global, Brave Pastor Jeff, etc. In that</p>	<p><b>Video Request Form</b></p> <p>Video Request Form</p> <p>Posting Process: Go to the appropriate Ministry Project in Basecamp and create a new "List" and name that list the video that you are planning. After creation, the email list</p>	<p><b>brave-guidelines1_v1 .pdf</b></p> <p>Dave and Lisa Here are the branding guidelines</p>
<b>All Events</b>	<b>Social Media</b>	<b>Sermon</b>	

## DOCS & FILES

This is the place to upload all content, photos, Google Docs, Word Docs, Login Credentials, etc. Note this is for commonly used items ONLY. If it relates directly to a task, just upload it to the task.



## ASSIGNMENTS

When you assign a To-Do, the task will go into the person's assignments.

The assignments section has three tabs. **USE THE MIDDLE TAB.** This will list out your tasks in the order that they are due, so you can go through each task in the correct order of importance.

There may be times when you may want to use the other tabs.

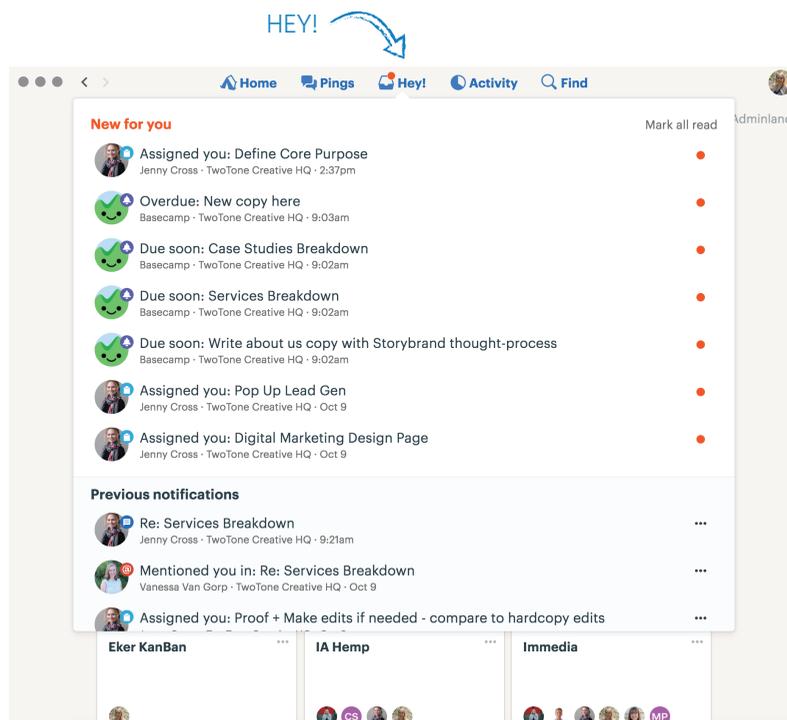
For example, if you want to check up on a task that you assigned (but is not assigned to you) look at the tab on the right.

If an assignment does not have a date for some reason, or you want to see which Lists your assignments fall under, go to the tab on the left.

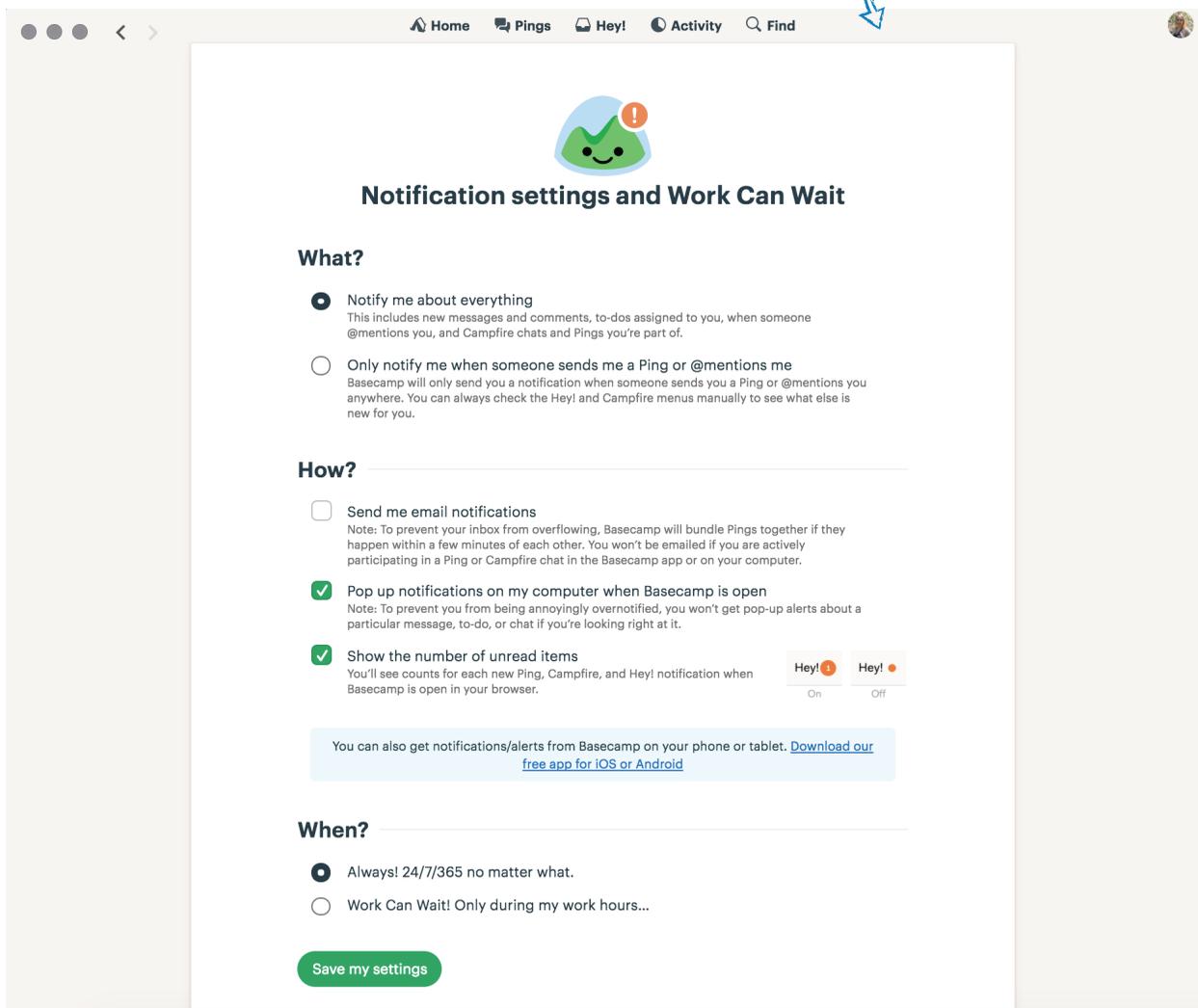
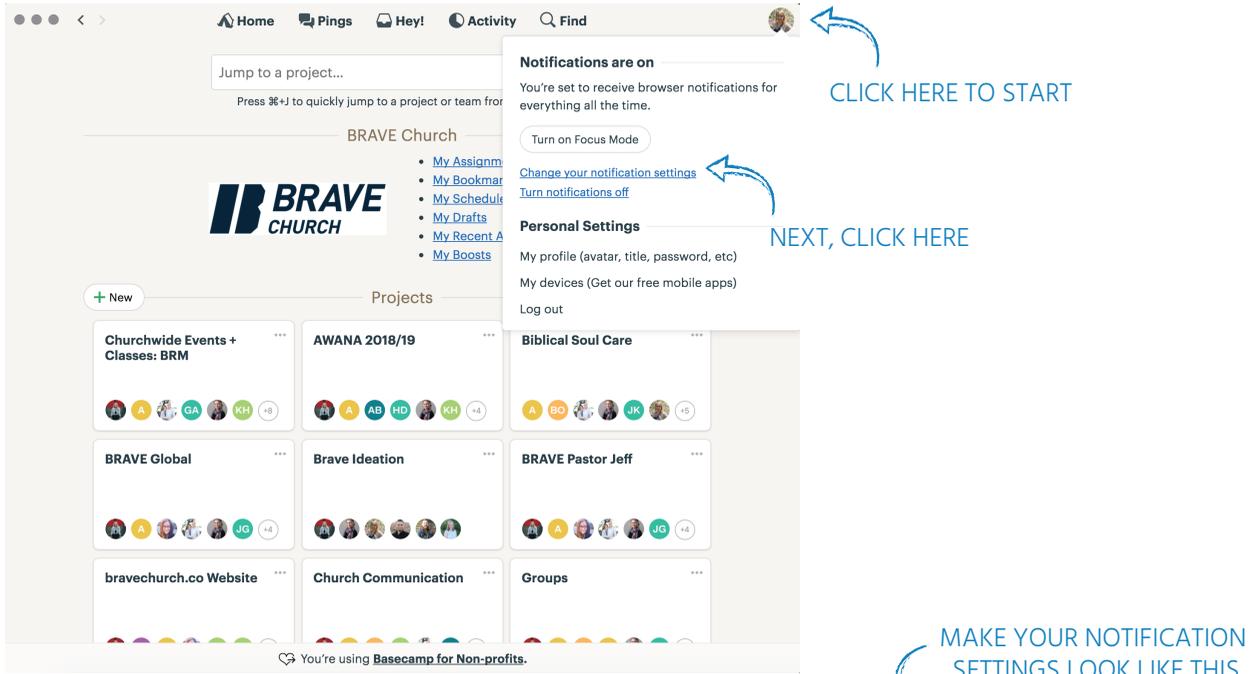
## EMAIL NOTIFICATIONS + HEY!

We recommend turning off your email notifications (UNLESS you're only on Basecamp about once a month, in that case emails might be a good option). Your inbox can quickly get flooded with notifications from Basecamp, so turning these off will help you stay on task and keep things organized.

Instead of checking tasks through emails, use the "Hey!" tool at the top. This will show you a list of your notifications. Go through the list and click on each one.

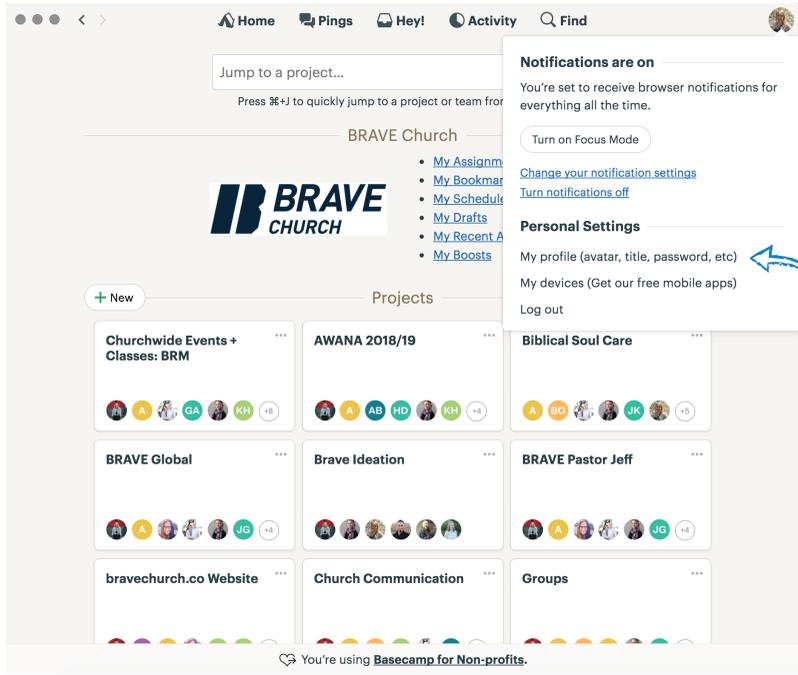


# IDEAL NOTIFICATION SETTINGS



## YOUR PROFILE

We love seeing your beautiful faces in Basecamp! Add a profile picture so that we can start putting faces to names.



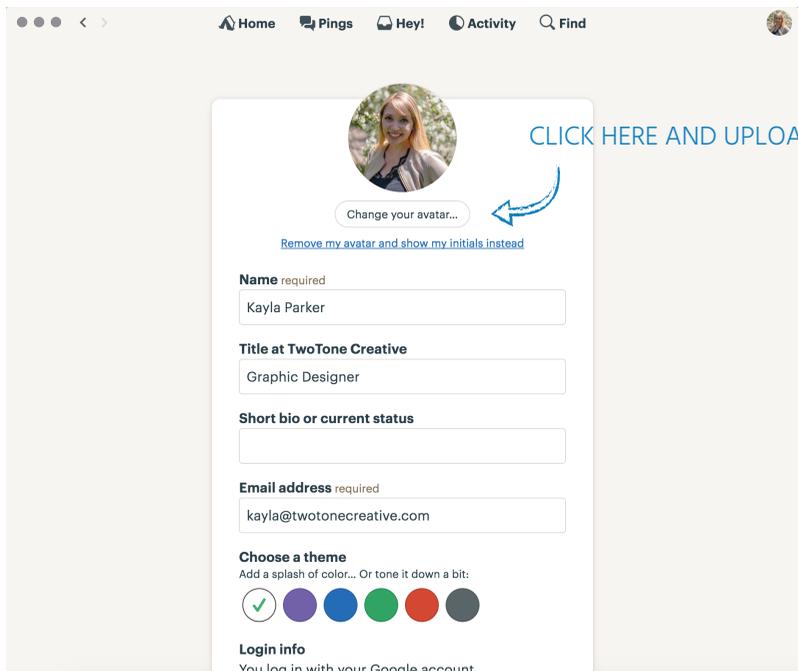
The screenshot shows the Basecamp user profile menu. The menu is open, displaying options for notifications and personal settings. Annotations with blue arrows point to the profile picture icon in the top right corner and the 'Personal Settings' section.

**Annotations:**

- CLICK HERE TO START (points to the profile picture icon)
- NEXT, CLICK HERE (points to the Personal Settings section)

**Menu Items:**

- Notifications are on
- Turn on Focus Mode
- Change your notification settings
- Turn notifications off
- Personal Settings
- My profile (avatar, title, password, etc)
- My devices (Get our free mobile apps)
- Log out



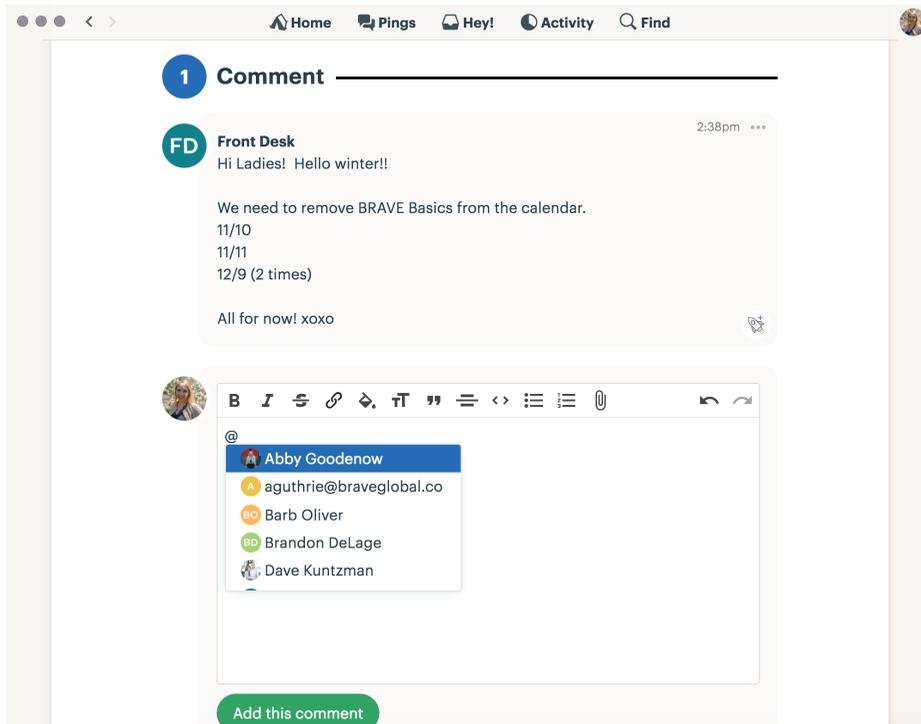
The screenshot shows the Basecamp profile editing form. The form is titled 'Change your avatar...' and includes fields for name, title, short bio, email address, and theme selection. Annotations with blue arrows point to the 'Change your avatar...' button and the 'Remove my avatar and show my initials instead' link.

**Annotations:**

- CLICK HERE AND UPLOAD A PHOTO (points to the 'Change your avatar...' button)

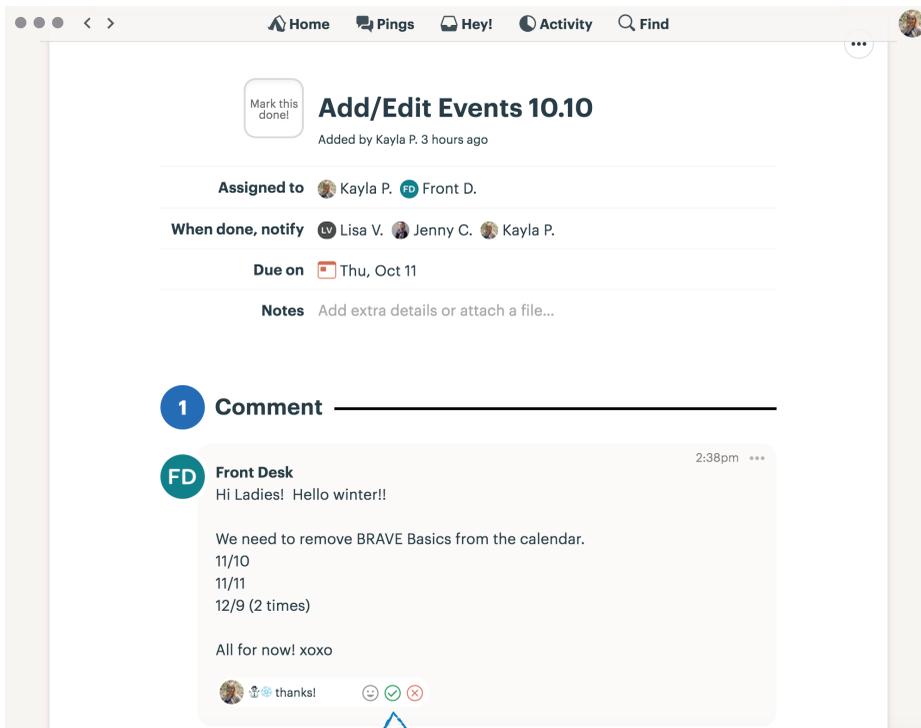
**Form Fields:**

- Name** required: Kayla Parker
- Title at TwoTone Creative:** Graphic Designer
- Short bio or current status:**
- Email address** required: kayla@twotonecreative.com
- Choose a theme:** Add a splash of color... Or tone it down a bit: (Green selected)
- Login info:** You log in with your Google account.



## TAGGING

Tagging is just like on Facebook or Instagram. Type the “@” symbol and then the person’s name.



## BOOSTS

Boosts are a fun way to let people know they did a good job! Add a few emojis or a simple “Thanks!” and hit the green check mark.

## ACTION ITEMS

- Download the desktop app.
- Add project tiles.
- Customize tools within project tiles.
- Add any applicable documents to the “Docs & Files” tool.
- Invite individuals to projects.
- Create to-do lists.
- Add To-Dos to lists.
- Customize your notification settings.
- Add a profile picture and customize your profile settings.
- Practice tagging someone on Basecamp.
- Give someone a boost!
- Check your assignments daily.
- Check “Hey!” daily.
- Reach out to TwoTone if you have any questions!



## QUESTIONS?

If you ever have any questions about how to use Basecamp, just reach out to us, we'd love to help! Email [hello@twotonecreative.com](mailto:hello@twotonecreative.com).