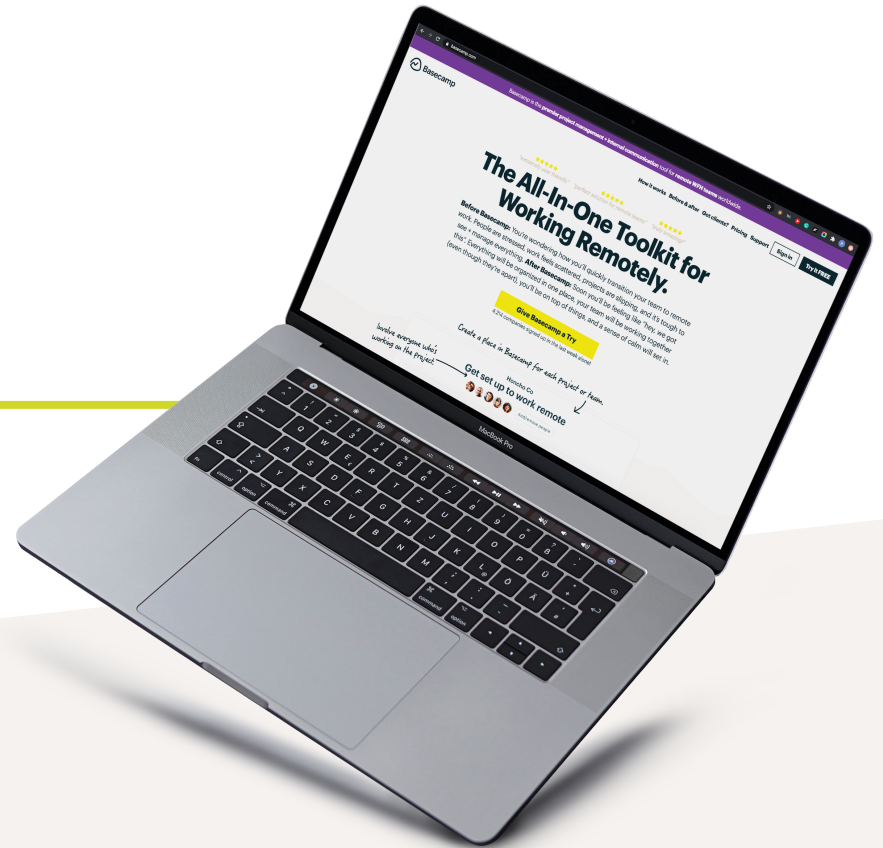


Basecamp Tips

A TwoTone Tutorial



FIRST THINGS FIRST!

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.

BONUS: There's also an app for your phone if you want to stay connected on the go!

You can download the desktop app online at <https://basecamp.com/via>

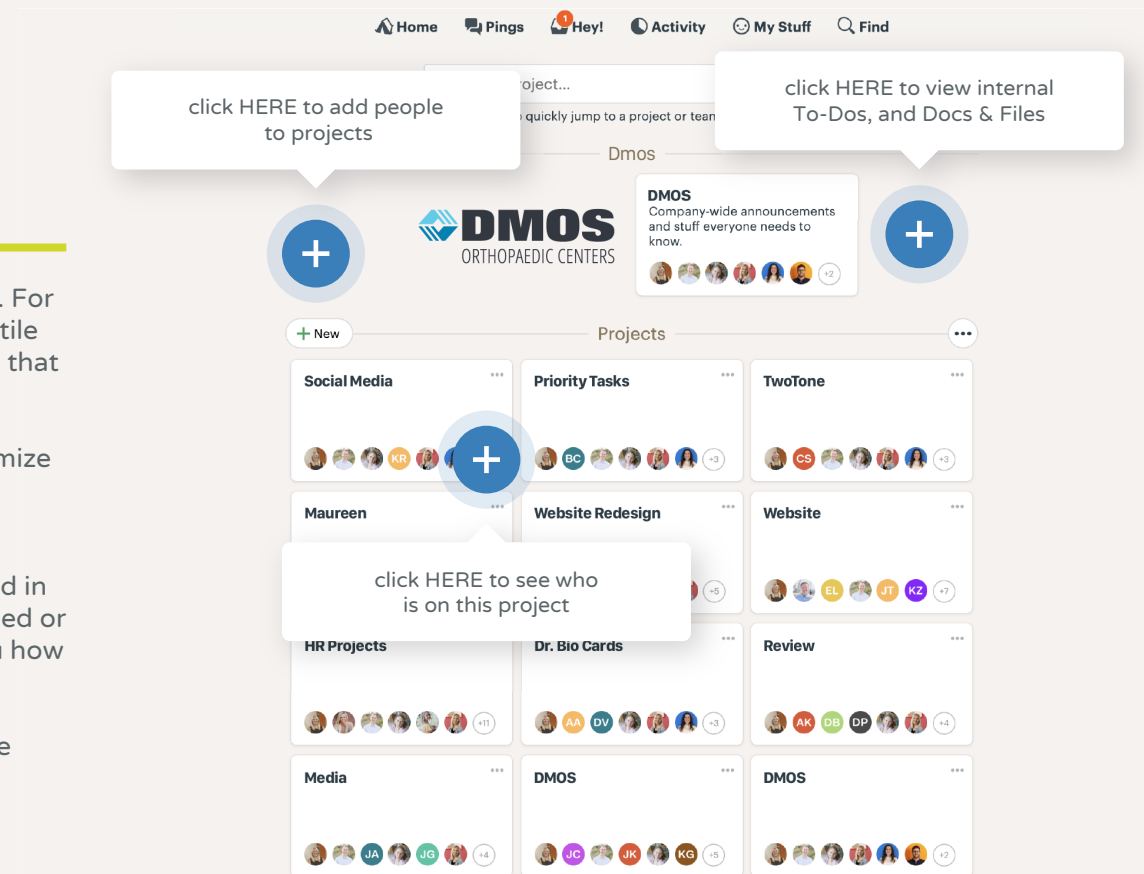
PROJECTS

Projects are a great way to divide tasks out on a high level. For example, we often divide out by project type. One project tile could be called "Social Media," for example. For TwoTone, that might be: Web Design, Print Design, and 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 section shows you how to add new people to projects.

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



ADD PEOPLE TO PROJECTS

STEP 1

To add or remove people to your team in Basecamp you need to click the button in the top right of the home screen. This will show you everyone who is already on the project.

STEP 2

In order to add someone to your team you must enter their Name, Email, Title, and Company in the respective fields. Adding a personal note to the email never hurts, especially to help remind them to take action.

After all information is entered you can either preview the email you are about to send or send the invitations to Basecamp instantly.

The image is a composite of two screenshots from the Basecamp interface, illustrating the process of adding people to a project.

Left Screenshot (Project Overview):

- At the top, a navigation bar includes links for Home, Pings, Hey!, Activity, and My Stuff.
- The main header shows the project name "DMOS" and the role "Monthly Retainer".
- Below the header is a row of team member avatars. A callout bubble points to a blue circular button with a white plus sign, labeled "click HERE to add people to projects".
- To the right of the avatars is a button labeled "Add/remove people".
- A "Projects" section lists various tasks and dates, including "Social Media August 2020", "September 2020", and "October 2020".
- At the bottom, a "Project Activity" section shows a list of recent comments and updates, such as "TwoTone (. commented on Changing hours on UIC cards" and "On TwoTone, Kailee O. added".

Right Screenshot (Add People Modal):

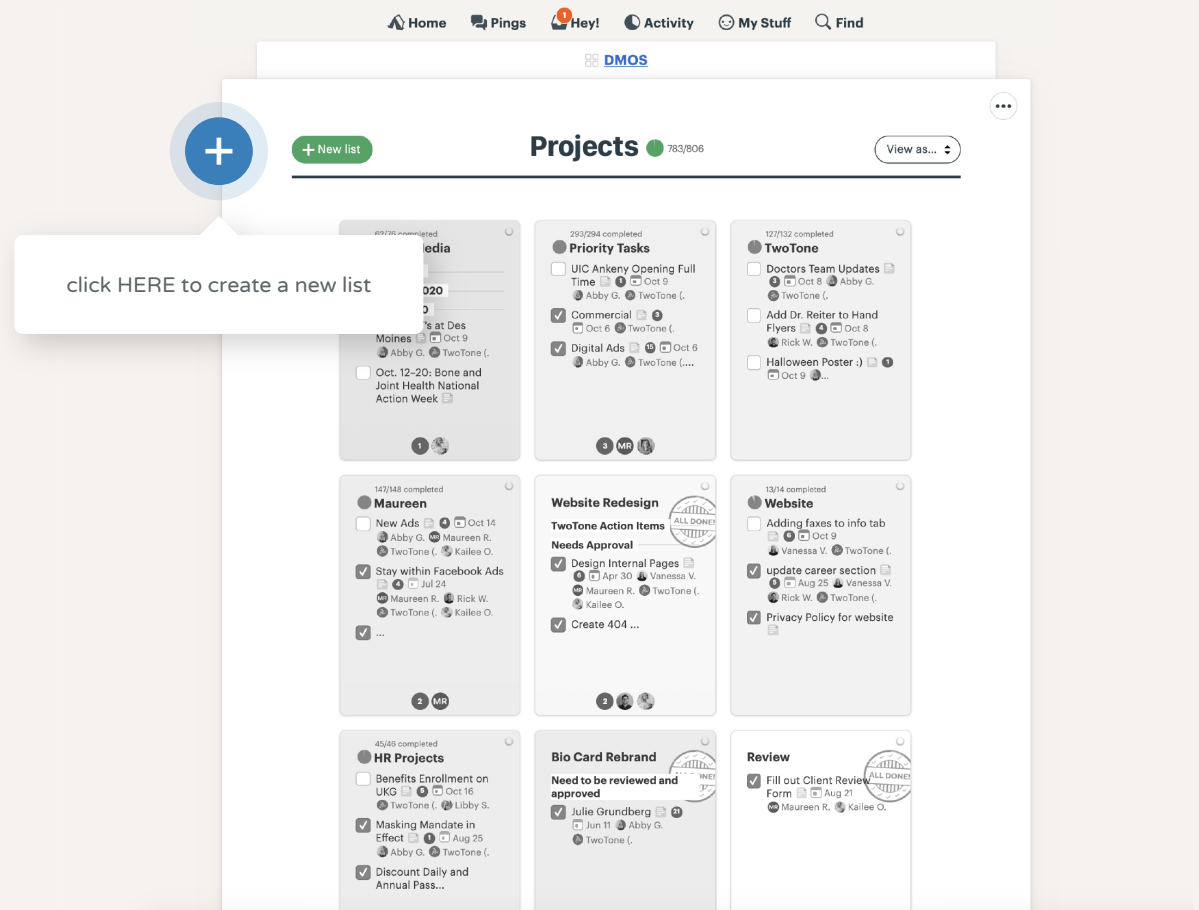
- The modal is titled "Add people" and has a close button in the top right corner.
- A callout bubble points to the "Add people" button, labeled "click HERE to add Name, Email, Title, and Company".
- The modal contains three main sections:
 - 1. Who do you want to add?** This section includes input fields for Name, Email, Title (optional), and Company (optional). A blue circular button with a white plus sign is overlaid on the Email field. Below these fields are two buttons: "Add another person" and "Pick people from a company...".
 - 2. Add a personal note to the invitation email (optional)** This section has a text area labeled "Add a personal note to the email".
 - 3. Preview and send email** This section includes a search bar, a "Preview the email" button, and a "Send now" button.
- At the bottom, a section titled "These people are already on this project" lists team members: "TwoTone Creative" (Abby Goodenow) and "Jenny Cross".

LISTS

Lists are how you divide tasks out on a high level. For example, Once you have your project tile, it's time to start breaking things down further. You can create Lists under To-Dos. Using our “Social Media” example, a few List examples might be “Facebook Posts” or “Captions”.

NOTE: be sure to add in everyone who is involved.

BONUS: you can click the **...** icon to create groups within Lists to further divide projects.



TO-DOS

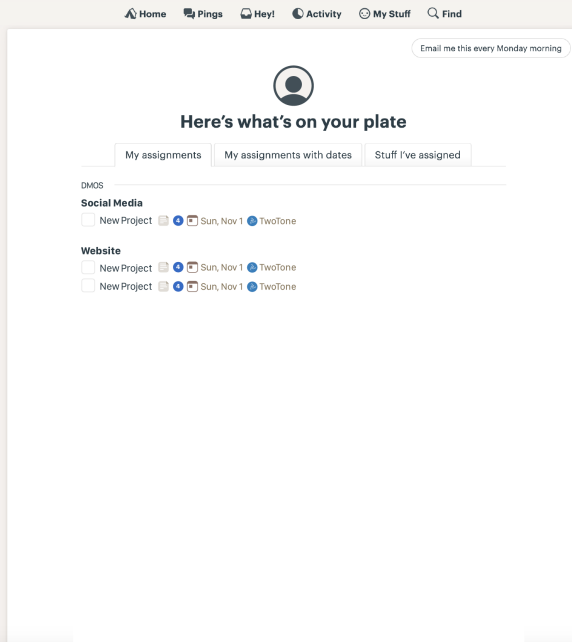
Once you have your lists set up, it's time to start adding To-Dos! When adding a To-Do, be sure to:

- Give it a very clear name that describes the task, such as “Facebook Posts”
- Then, assign the To-Do! Tag our project manager account, @TwoTone, along with the team members who will be working on the task.
- 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 in the Facebook Posts, when you want them posted, and whether or not you want to boost any of the posts.

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, please upload it to the task.

The screenshot shows the DMOS application interface. At the top, there is a navigation bar with links: Home, Pings, Hey!, Activity, My Stuff, and Find. Below this is a header with the DMOS logo. The main content area displays a form for adding a new To-Do. The form is titled "0/0 completed Social Media" and includes fields for "Describe this to-do...", "Assigned to" (with a placeholder "Type names to assign..."), "When done, notify" (with a placeholder "Type names to notify..."), "Due on" (with a placeholder "Select a date..."), and "Notes" (with a placeholder "Add extra details or attach a file..."). There are "Add this to-do" and "Cancel" buttons at the bottom of the form. Below the form is a "Discussion" section with a user profile picture and a text input field for comments. At the bottom, there is a "Subscribers" section showing "1 person will be notified when someone comments on this to-do list." and a button to "Add/remove people...". Below that, it says "You're not subscribed" and "You won't be notified when comments are posted." with a "Subscribe me" button.

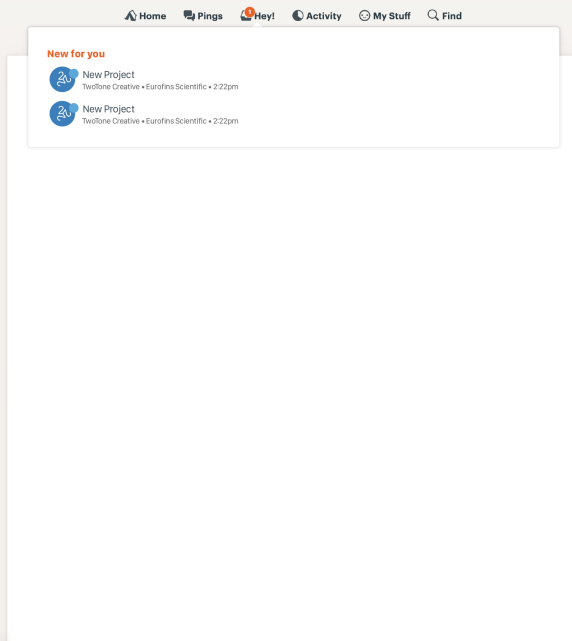


ASSIGNMENTS

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

We recommend using these notification settings for the best Basecamp experience.




Notifications are on

You're set to receive notifications for everything a... click HERE to update your notification settings

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

Home Pings Hey! Activity My Stuff Find



Notification settings and Work Can Wait

What?

- ☒ **Notify me about everything**
This includes new messages and comments, to-dos assigned to you, when someone @mentions you, and Campfire chats and Pings you're part of.
- ☐ **Only notify me when someone sends me a Ping or @mentions me**
Basecamp will only send you a notification when someone sends you a Ping or @mentions you anywhere. You can always check the Hey! and Campfire menus manually to see what else is new for you.

How?

- ☐ **Send me email notifications**
Note: To prevent your inbox from overflowing, Basecamp will bundle Pings together if they happen within a few minutes of each other. You won't be emailed if you are actively participating in a Ping or Campfire chat in the Basecamp app or on your computer.
- ☒ **Pop up notifications on my computer when Basecamp is open**
Note: To prevent you from being annoyingly overnotified, you won't get pop-up alerts about a particular message, to-do, or chat if you're looking right at it.
- ☒ **Show the number of unread items**
You'll see counts for each new Ping, Campfire, and Hey! notification when Basecamp is open in your browser.

Hey! 1 Hey! 0
On Off

You can also get notifications/alerts from Basecamp on your phone or tablet. [Download our free app for iOS or Android](#)

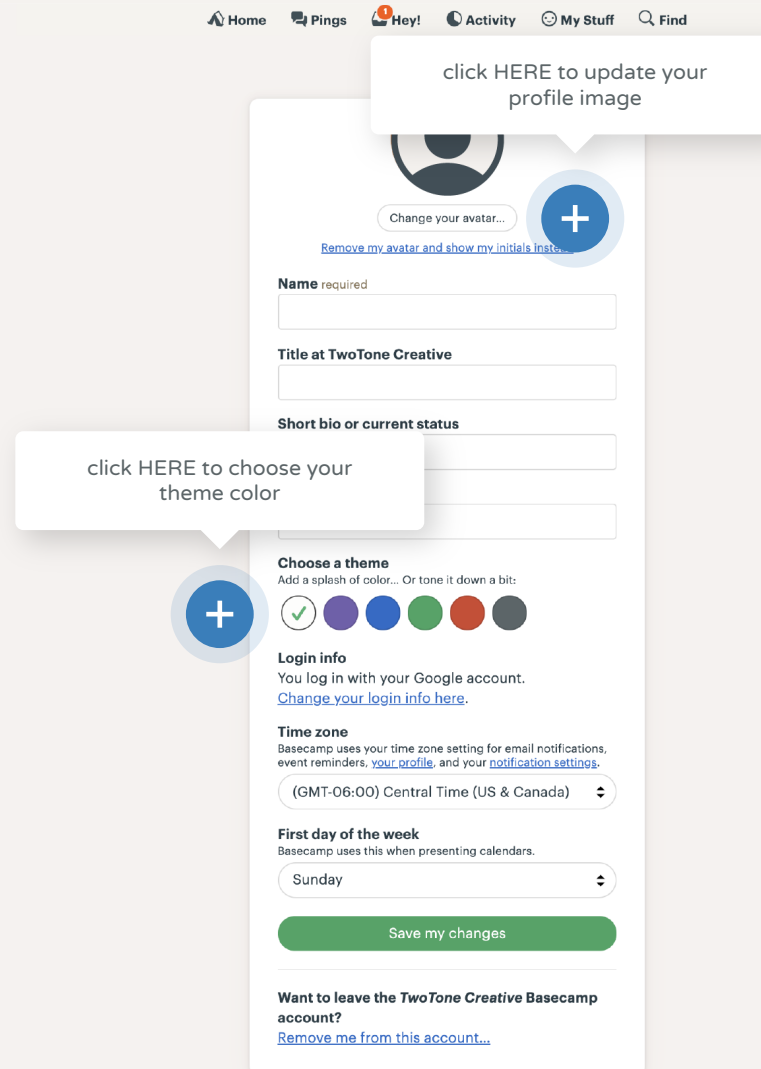
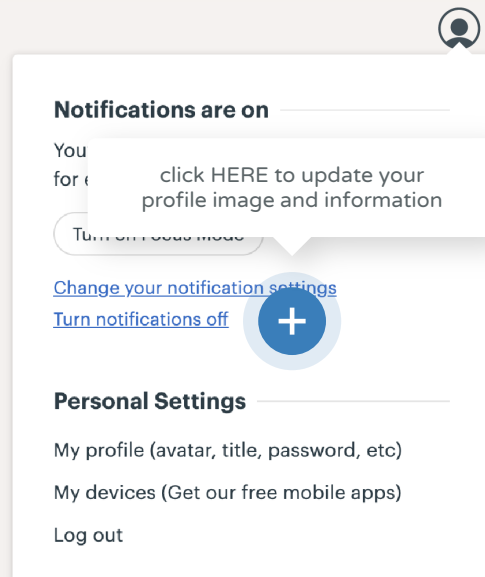
When?

- ☒ **Always! 24/7/365 no matter what.**
- ☐ **Work Can Wait! Only during my work hours...**

Save my settings

YOUR PROFILE

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



TAGGING

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

Home Pings Hey! Activity My Stuff Find

DMOS

Mark this done! **New Project**
Added 2 minutes ago

Assigned to TwoTone (.)

When done, notify Type names to notify...

Due on Select a date...

Notes Add extra details or attach a file...

Discussion

@ Amy Knock
Dan Behler
David Prins
Jenny Cross

Add this comment

Subscribers
2 people will be notified when someone completes or comments on this to-do.
Add/remove people...

You're subscribed

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.

Home Pings Hey! Activity My Stuff Find

DMOS

Mark this done! **New Project**
Added 2 minutes ago

Assigned to TwoTone (.)

When done, notify Type names to notify...

Due on Select a date...

Notes Add extra details or attach a file...

Discussion

DMOS
TwoTone Thank you! I will review with the team.

TwoTone (Grace Maher) changed the due date
Was Wed, Aug 12
Now Thu, Aug 27

TwoTone (Grace Maher) completed this to-do
Aug 27

Boost TwoTone... [emojis]

click HERE to boost a post

write your boost HERE

A background image showing three people (two women and one man) sitting on a couch, smiling and looking at papers. The image is overlaid with a blue gradient.

Have a question?

If you have any questions about how to use Basecamp, just reach out to us, we'd love to help!

CONTACT US

hello@twotonecreative.com