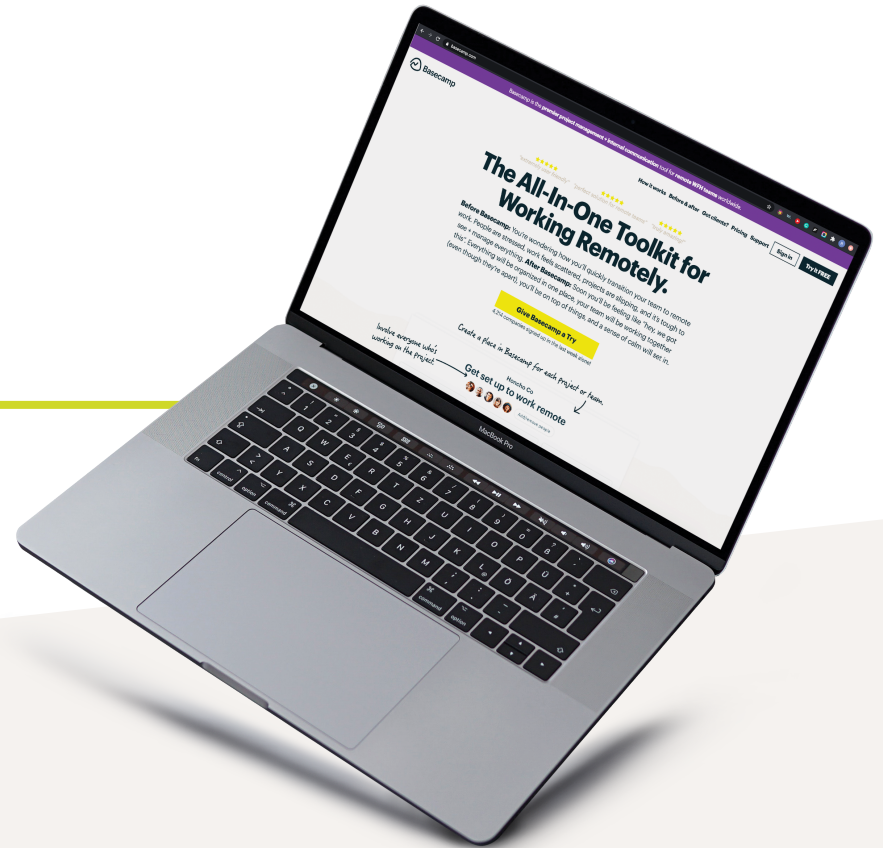


Basecamp Tips

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, in churches, we often divide out by ministries. For example. Other examples would be Men's Ministry, Kids, or Worship. 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.

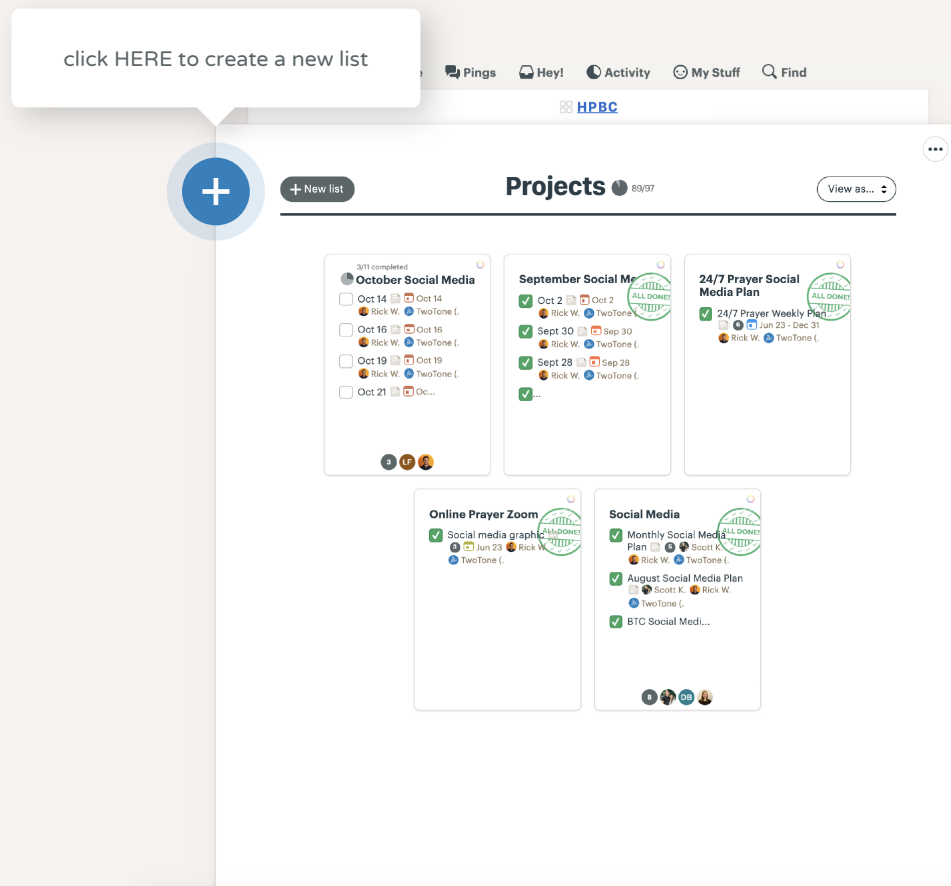


LISTS

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."

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.



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 consists of two screenshots from the Basecamp interface, illustrating the process of adding people to a project.

Left Screenshot (Home Screen):

- Navigation bar: Home, Pings, Hey!, Activity, My Stuff.
- Project Name: **HPBC**
- Subtitle: Company-wide announcements and stuff everyone needs to know.
- Team avatars: AH, AV, DB, JW, LF, LS, LE, MM, MW, SD, etc.
- Buttons: Add/remove people, + (Add button).
- Message Board: What's your shirt size? Hello Scott. We recently got... March Updates! Hi HPBC! We've really... Hello, Everyone! My name is Vanessa and I... Welcome to Basecamp! Announcement — Hi.
- Projects: Branding & logo files, etc.
- To-dos: Schedule, ALL DONE!
- Change tools (add Campfire, Schedule, etc.)
- Company HQ Activity:

 - Tuesday: Scott K. changed who can access this Company HQ. Melanie Van Horn was granted access.
 - Tuesday, September 29: 2:01pm AV Andy V. changed who can access this Company HQ. Andrea Hockenbrocht was granted access.
 - Tuesday, August 25: 11:52pm Rick W. added a webhook to this Company HQ. Some information will now be sent to https://hooks.zapier.com/hooks/standard/2911571/382b9d7d21ce462b96ef99024e05f

Right Screenshot (Add People Modal):

- Navigation bar: Home, Pings, Hey!, Activity, My Stuff, Find.
- Project Name: **HPBC**
- Modal Title: Add people to project
- Form Fields: Name, Email, Title (optional), Company (optional).
- Buttons: Add another person, or, Pick people from a company...
- Section 2: Add a personal note to the invitation email (optional). Add a personal note to the email.
- Section 3: Preview and send email. Preview the email, Send now.
- What happens next? Everyone above will be immediately added to the project and have full access to everything in the project. They'll receive an email with instructions to join the project.
- These people are already on this project:

 - TwoTone Creative: Abby Goodenow (Senior Graphic Designer at TwoTone Creative, abby@twotonecreative.com, Edit, Remove, Send a link to log in).
 - Jenny Cross (Founder + Creative Director at TwoTone Creative, jenny@twotonecreative.com, Edit, Remove, Send a link to log in).

TO-DOS

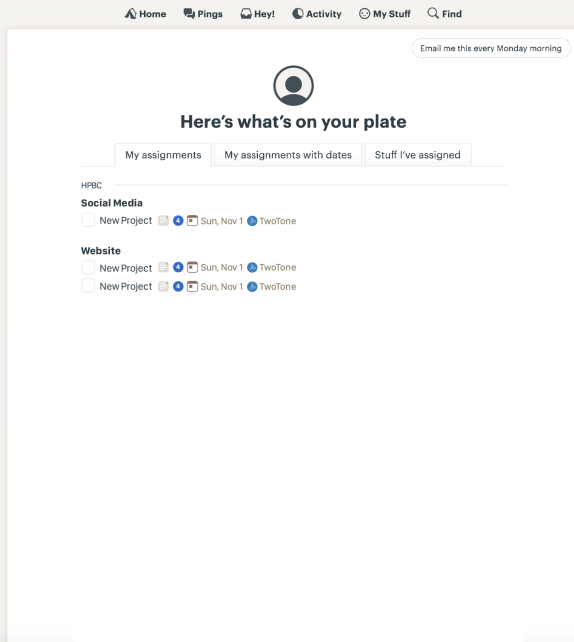
Once you have your lists set up, it's time to start adding To-Dos! When adding a To-Do, be sure to:

- 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 HPBC (Home Project Board) interface. At the top, there's a navigation bar with links: Home, Pings, Hey!, Activity, My Stuff, and Find. Below this, the HPBC logo is visible. The main content area displays a task titled "Social Media" with a progress indicator "0/0 completed". The task form includes several fields: "Describe this to-do..." (with a checkbox), "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..."). At the bottom of the form are two buttons: "Add this to-do" (green) and "Cancel" (grey). Below the form is a "Discussion" section with a header and a text input field for comments, preceded by a user profile icon. At the bottom, there's a "Subscribers" section showing "1 person will be notified when someone comments on this to-do list." and a button "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.

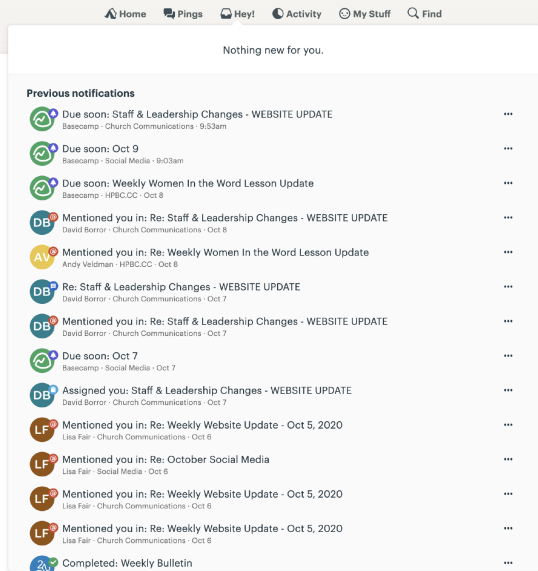


ASSIGNMENTS

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](#)

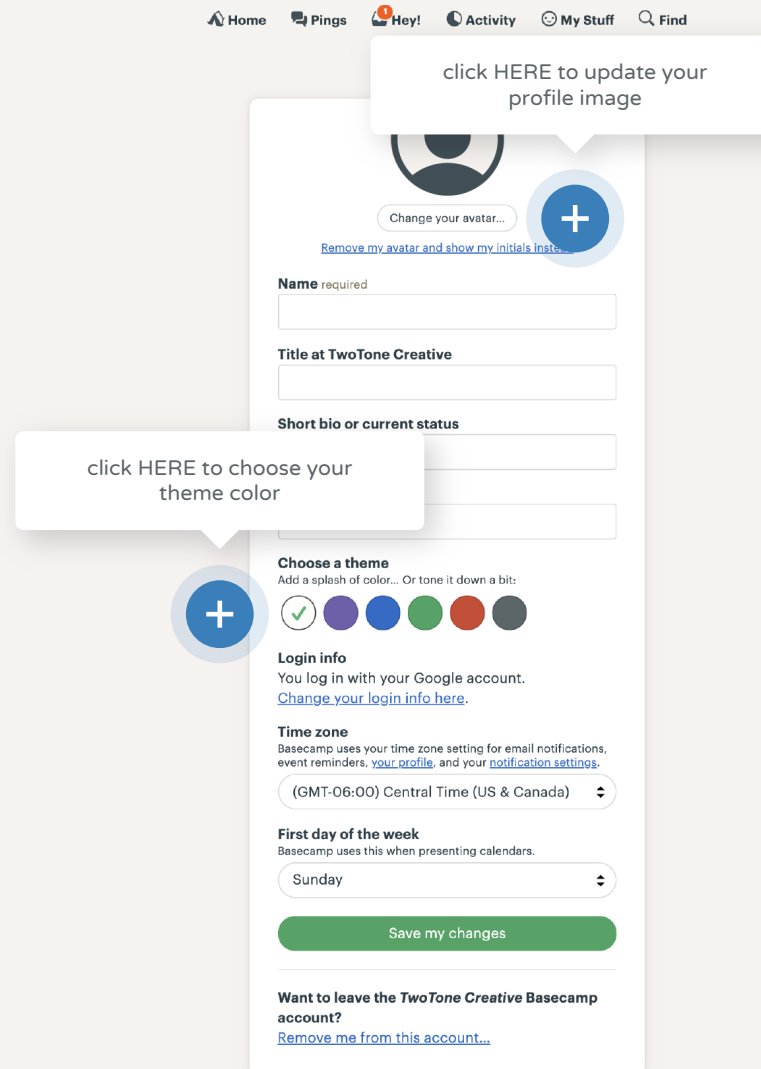
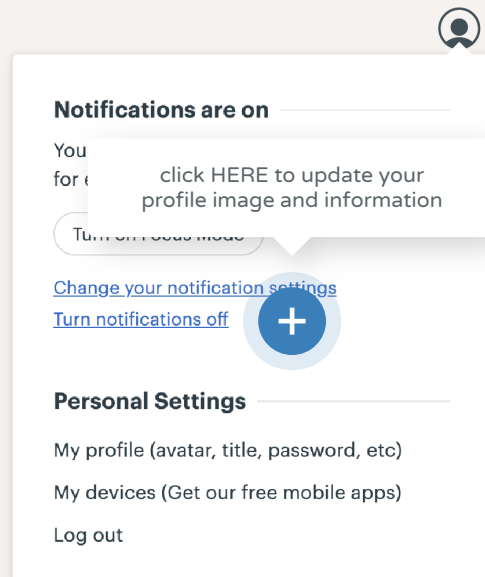
When?

- ☒ **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.

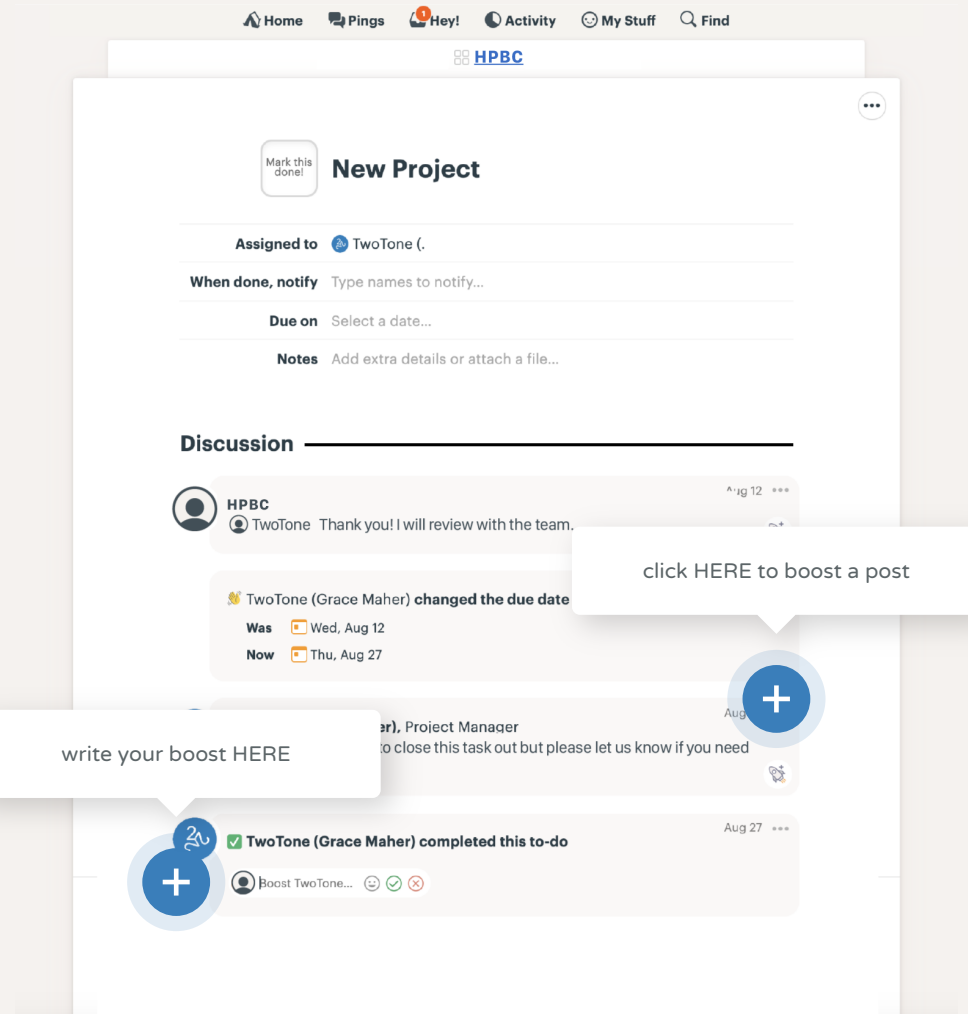
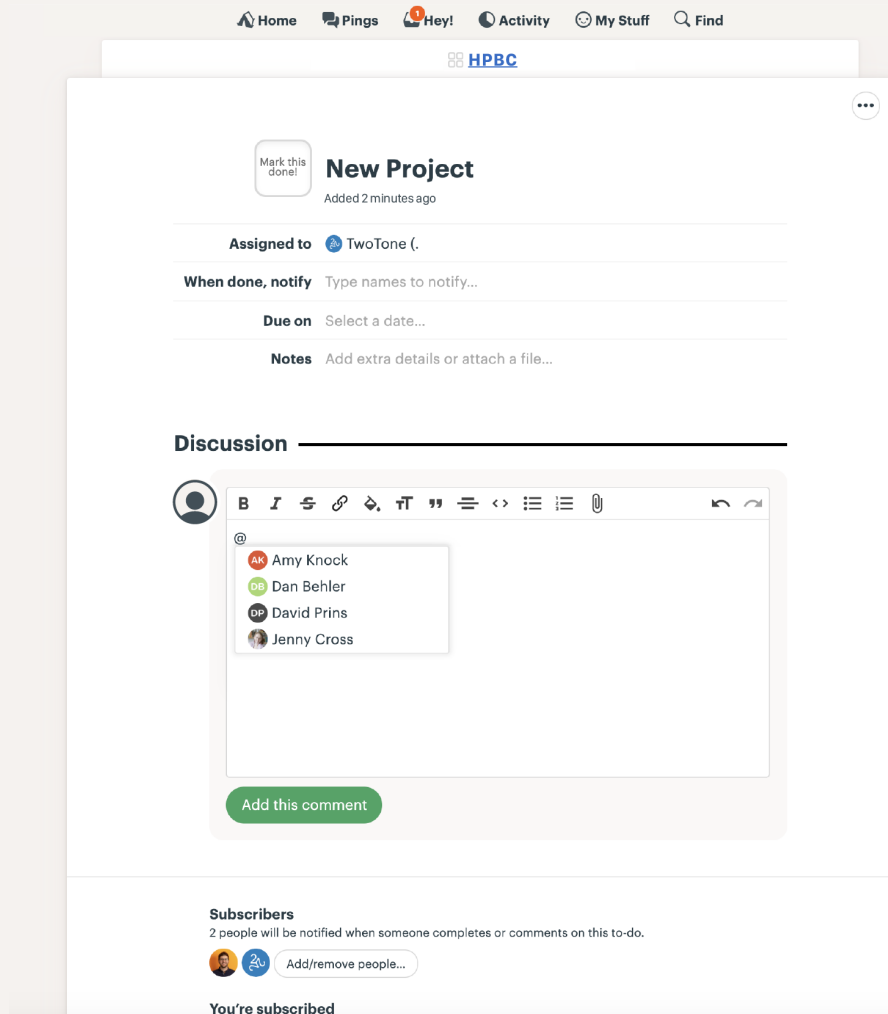


TAGGING

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

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.



A background image showing three people (two women and one man) sitting on a couch, smiling and looking at each other. 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