

99% percent of remote guides are mostly about what, and not about how. Use app X for this and set up Y for that. We're not happy about it and we know you deserve better.

These turbulent times call for radical measures. We're not going to talk about whether or not you should instruct your team to wear pants at all times, that's not what this is about. This guide will give you clear instructions for making a smooth transition towards remote operations. We will outline the most important challenges you're going to tackle and give you a set of very concrete steps to overcome them.

It's all about organization

One of the biggest challenges of working remotely is finding the most efficient way to organize and distribute tasks and assignments within your team. The Project section is a perfect solution as it gives you all the tools you need to map out all your activities in advance.

It's important not to be confined by the word "Project". As far as we're concerned, it's just a label for the basic structural unit of your work. Therefore, you can use projects to organize all your business activities - internal processes, human resources, team activities, all the way to actual projects you do for your clients.

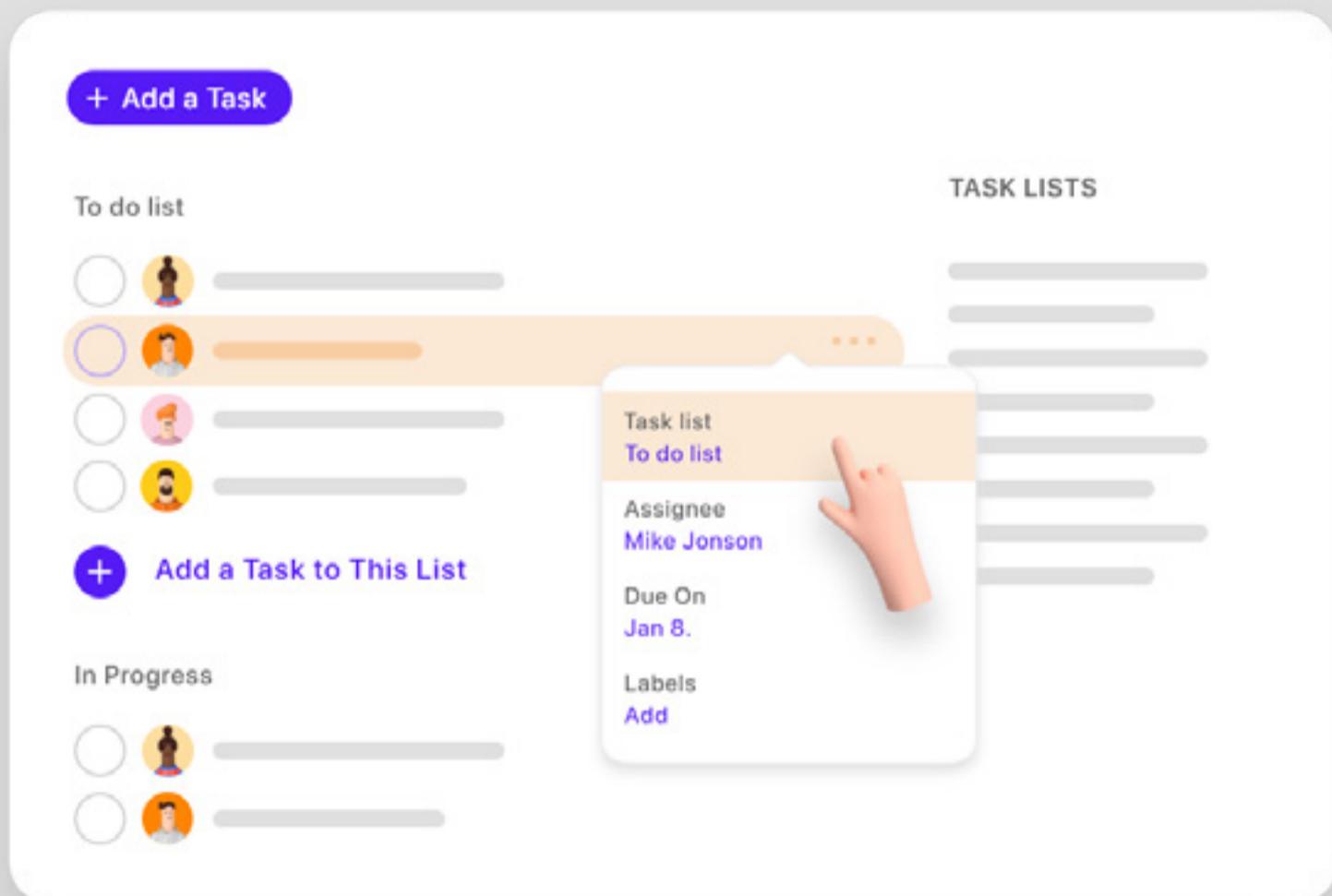


Give your work the needed structure

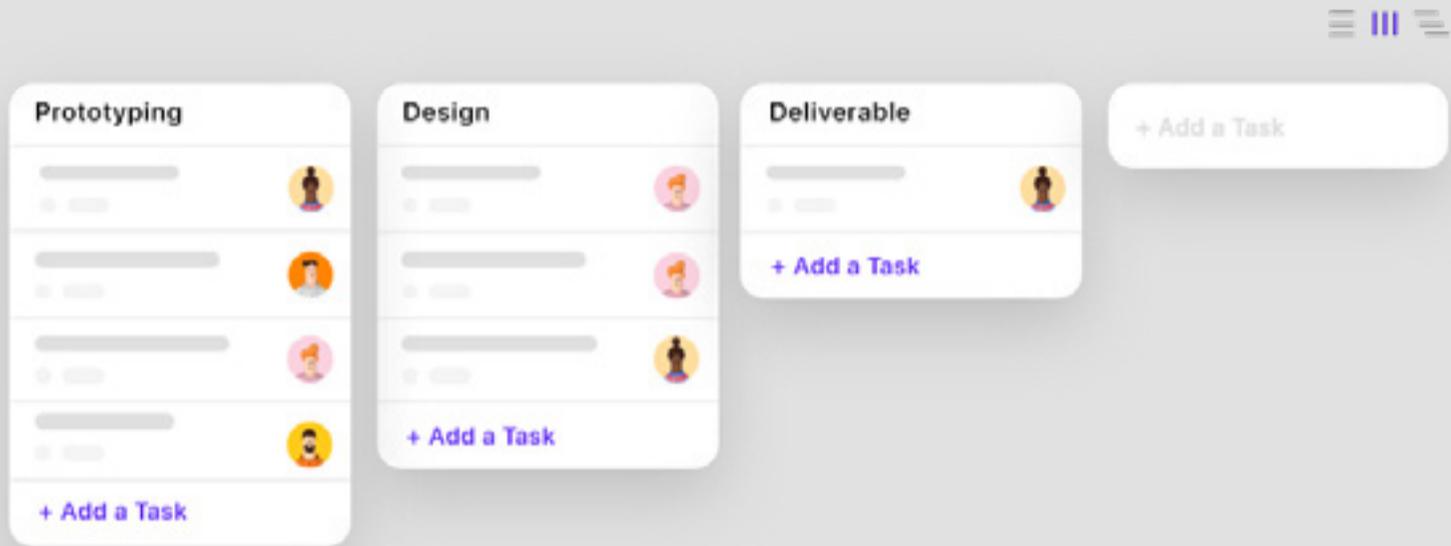
Create your projects, break down your work into actionable tasks and organize them using different task views, depending on your preferred workflow.

List View is perfect if your projects are structured like to-do lists. Each list can be a set of related activities, or even a milestone, with tasks serving as to-do items.

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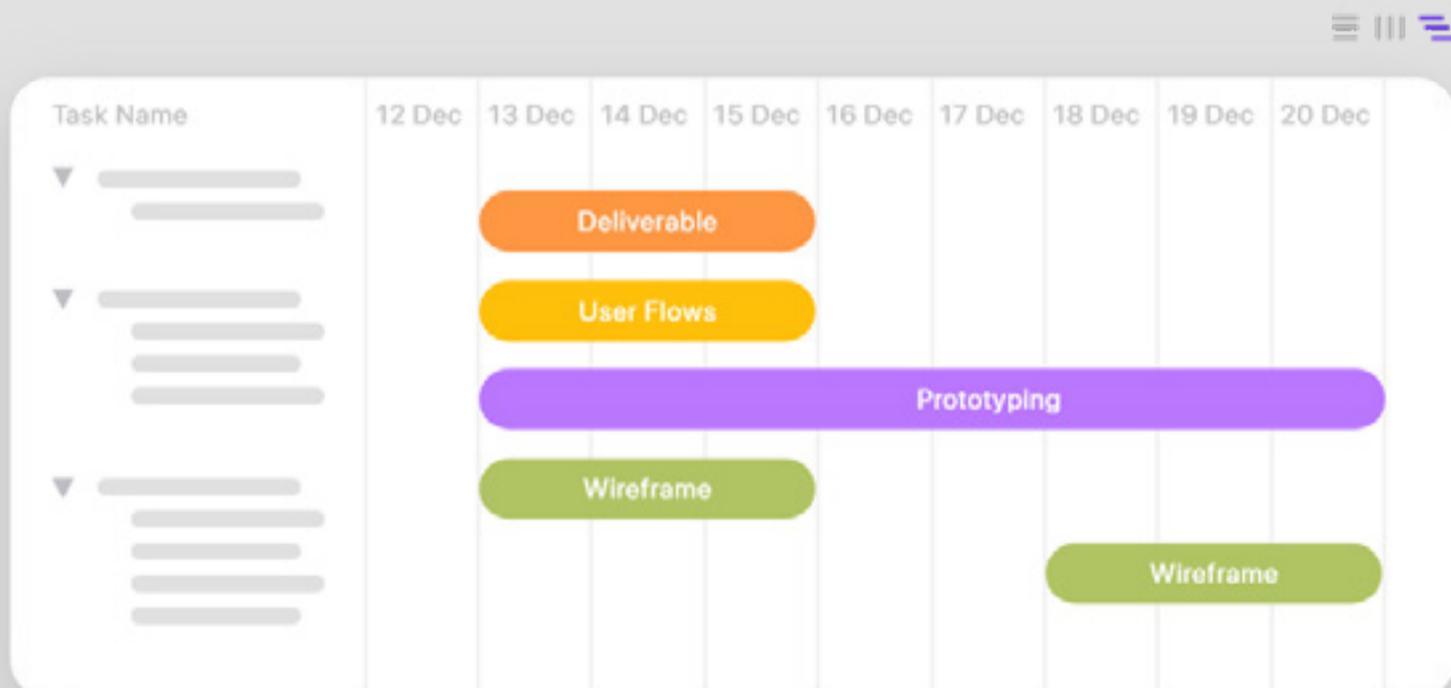


If you're a fan of kanban boards and stickers, we've also got you covered. **Column View** enables you to design your own board-like structure for your projects and drag & drop your tasks like items on a kanban board.



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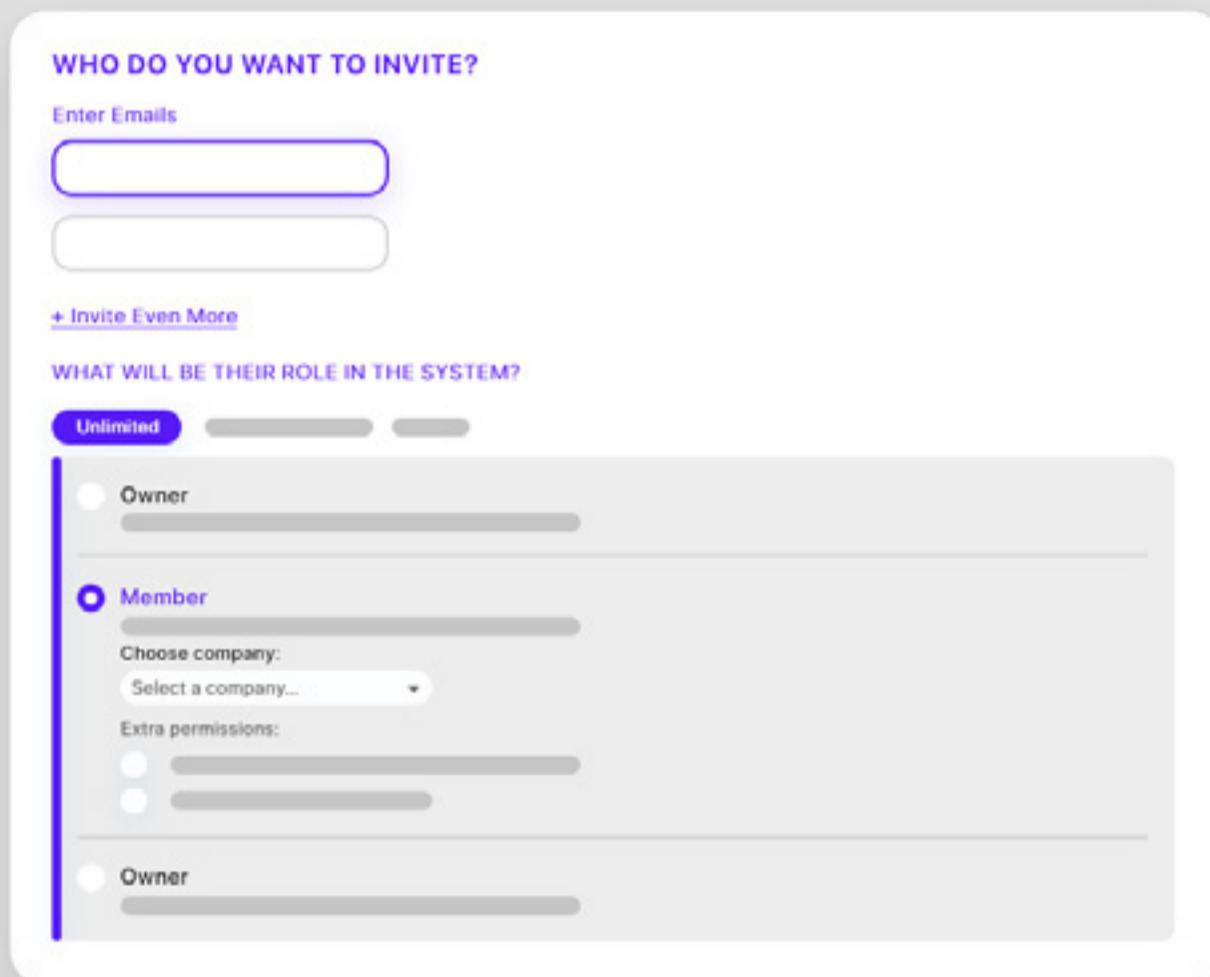
The **Timeline View** is perfect if you're working on a project that has a lot of interdependent activities, where you need to set dependencies between tasks.



Adding people and setting teams

Now that you've set up the structure it's time to invite your colleagues, set up teams, and assign people to different projects. It sounds like a lot to do, but ActiveCollab makes it very straightforward.

You can **send invites** from the People section or directly from each project. Each user can be given their role depending on the level of access you need them to have.



The screenshot shows a form titled "WHO DO YOU WANT TO INVITE?". It has two main sections. The first section, "Enter Emails", contains two empty text input fields. Below them is a link that says "+ Invite Even More". The second section, "WHAT WILL BE THEIR ROLE IN THE SYSTEM?", features a horizontal selection bar with "Unlimited" selected. Below this is a list of roles: "Owner", "Member", and "Owner". The "Member" role is selected. Under "Member", there is a "Choose company:" label, a dropdown menu with "Select a company..." and a downward arrow, and a section for "Extra permissions" with two radio buttons and corresponding input fields.

Once they're invited, you can set their hourly rates and group them into teams to stay on board with your internal company organization.

Adding assignments and maintaining focus

Once your projects are set-up and your people are in, it's time to start assigning **tasks** to individual team members. ActiveCollab tasks are much more powerful than simple to-do items, giving you an array of options to keep track of all discussions, files, and time records related to every individual activity.

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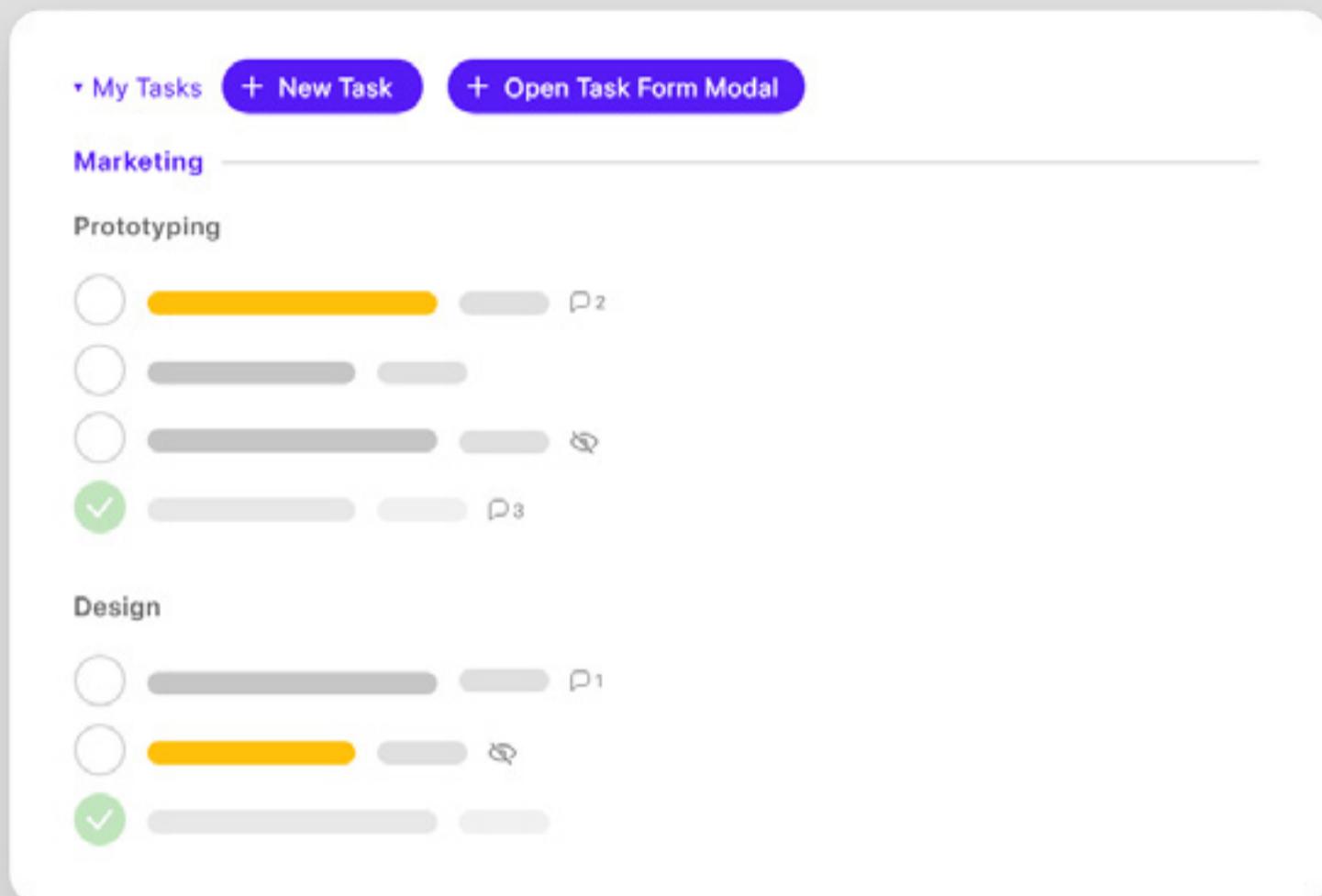
The screenshot displays the ActiveCollab task management interface. The main task details include:

- Task title: **Prototyping | Task #12 | Created by: John Doe**
- Buttons: **+ Add a Subtask** and **+ Add a Dependency**
- Discussion section with user avatars and text input fields.

The right sidebar contains the following sections:

- Task List**: A blue progress bar.
- Assignee**: A blue progress bar.
- Due on**: A blue progress bar.
- Labels**: A blue progress bar.
- Time Estimation**: A blue progress bar.
- Checkboxes: Hidden from clients, High priority.
- Time Tracking**: A section with a **+ Time** button (0:00h) and a play button (00:00).
- Time Tracking**: A section with a **+ Expense** button (0 USD).
- Checkbox: Task is billable.

In addition, each person on your team has their dedicated section within ActiveCollab that lists all their **personal assignments**, priorities, deadlines, time estimates, and a rundown of their activity.



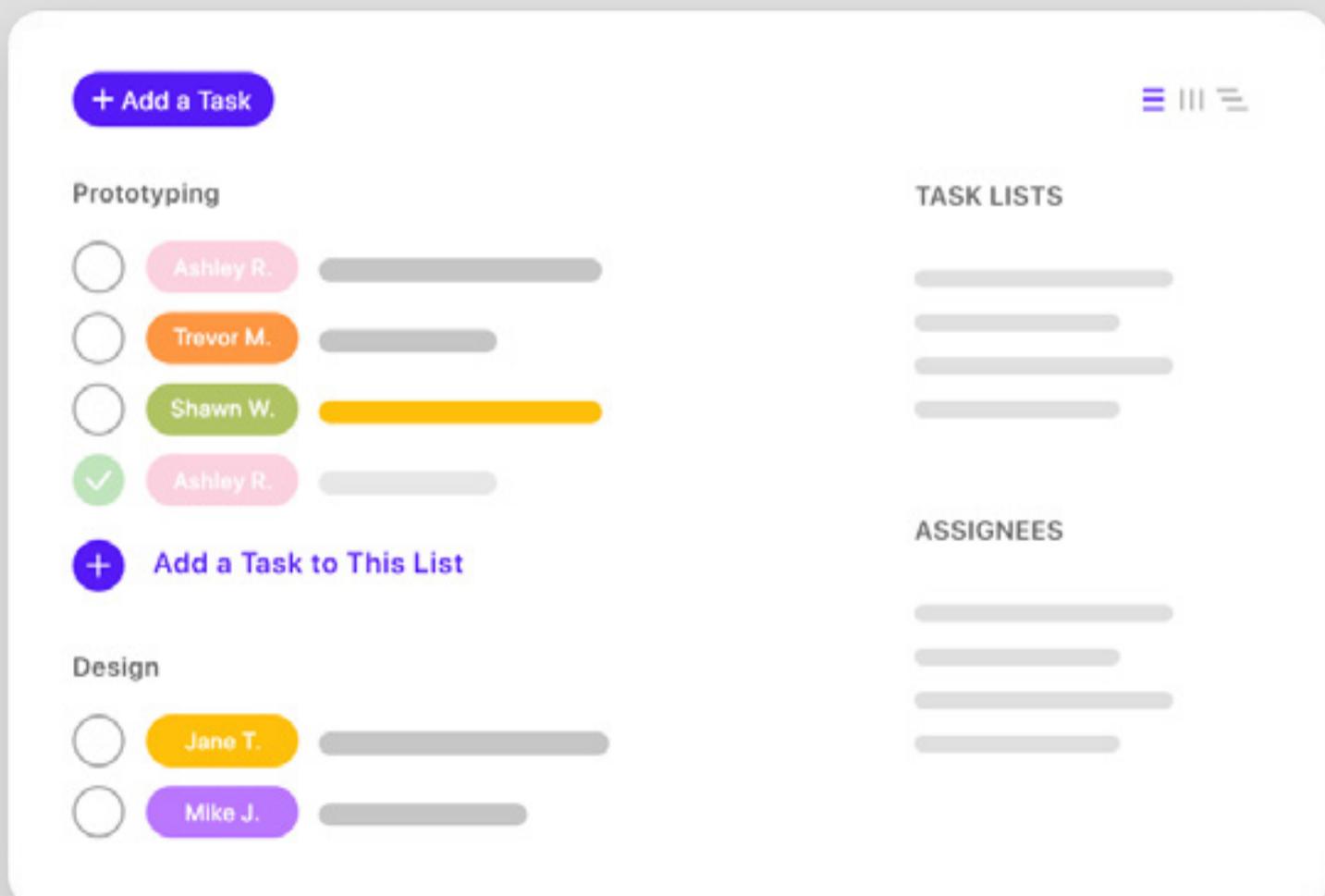
The ability to help your team focus on what's really important will keep your business on course and on target with all projects and initiatives you're running, even when your team is fully remote.

Stay ahead of deadlines

ActiveCollab helps you navigate complex project timelines by time-framing all tasks and milestones and clearly communicating the deadlines to all stakeholders. Setting the start and due date on a task will make the task visible on the project timeline, calendar, and in the assignee's My Work section.

If you need to clearly display certain tasks as more important you can mark them as high-priority, which will signal your team to start working on them right away.

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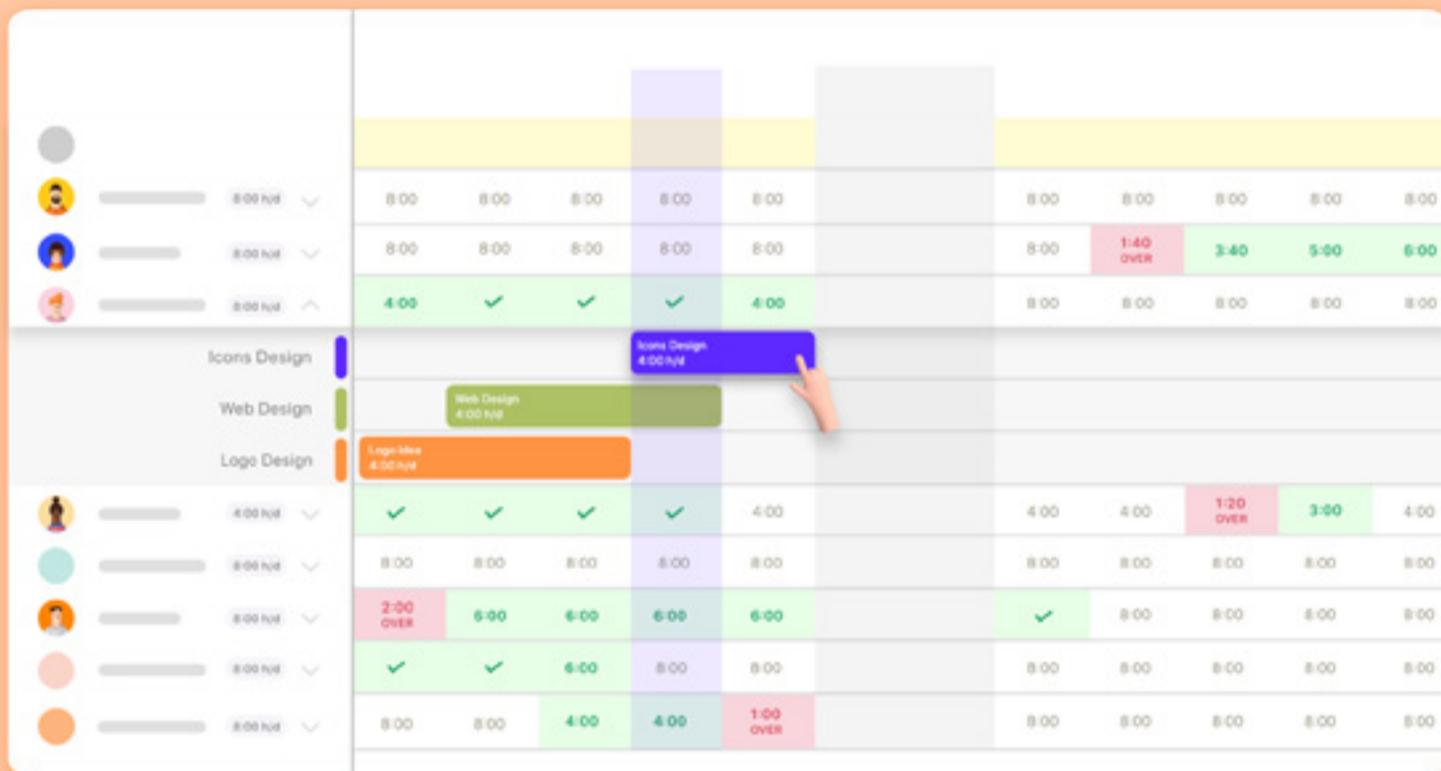


To complement the visual signals, you can also set email reminders on all tasks. This way you'll get notified if you want to start working on it at a later date or check up on the status of a task that's already underway.

With start and due dates, reminders, and priorities on every task, you'll always be aware of how much time you have to complete your work and all the tasks that require your urgent attention.

	MON	TUE	WED
 			
 			
 			
 			

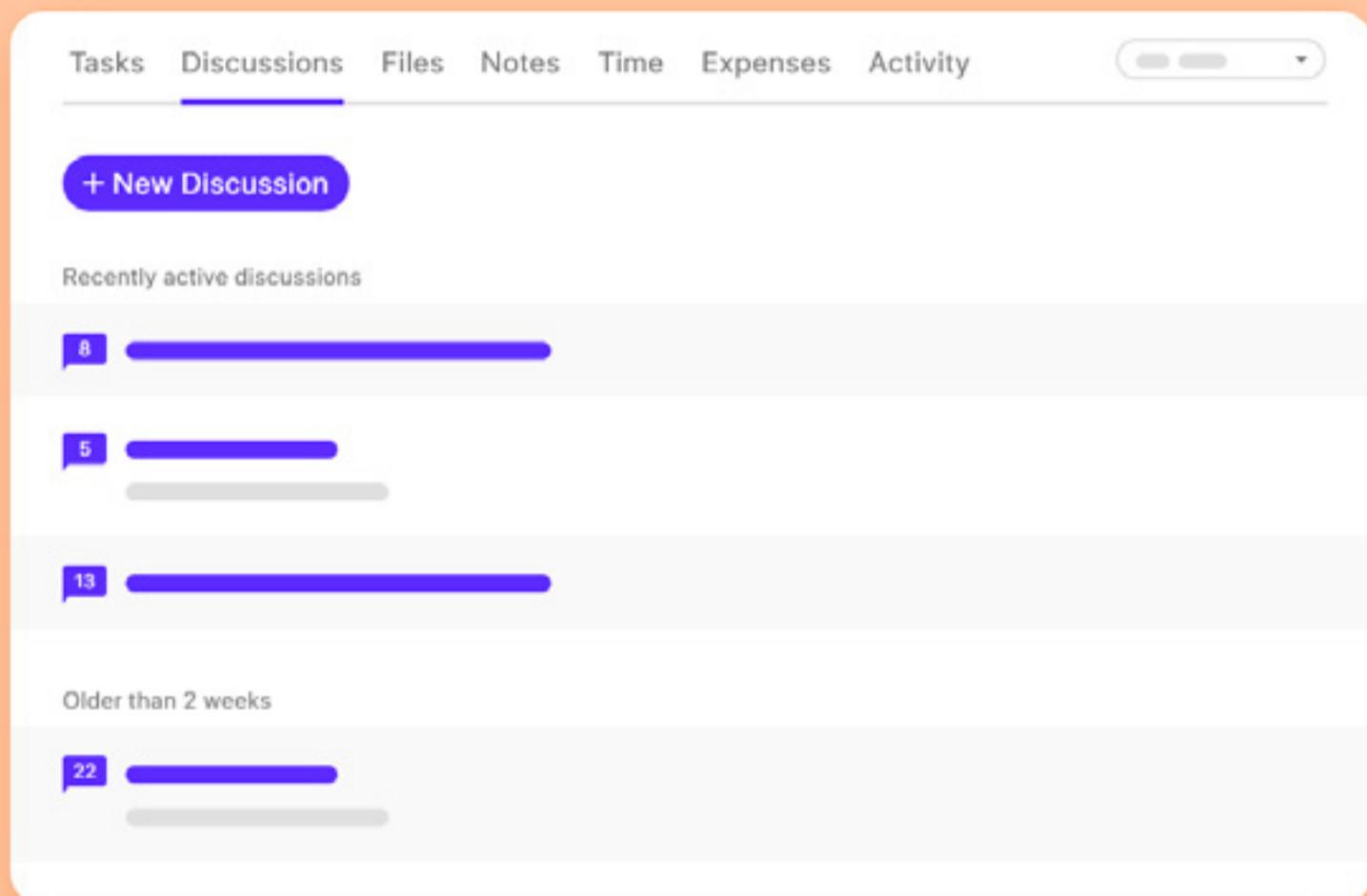
Make sure your team is at 100%



ActiveCollab is able to help you assign every task to the right person based on their capacity and availability. Each person has an adjustable daily capacity which can be utilized by creating time estimates on tasks that have a start and due date. This way you'll know the total number of hours each person is spending on all their tasks every single day.

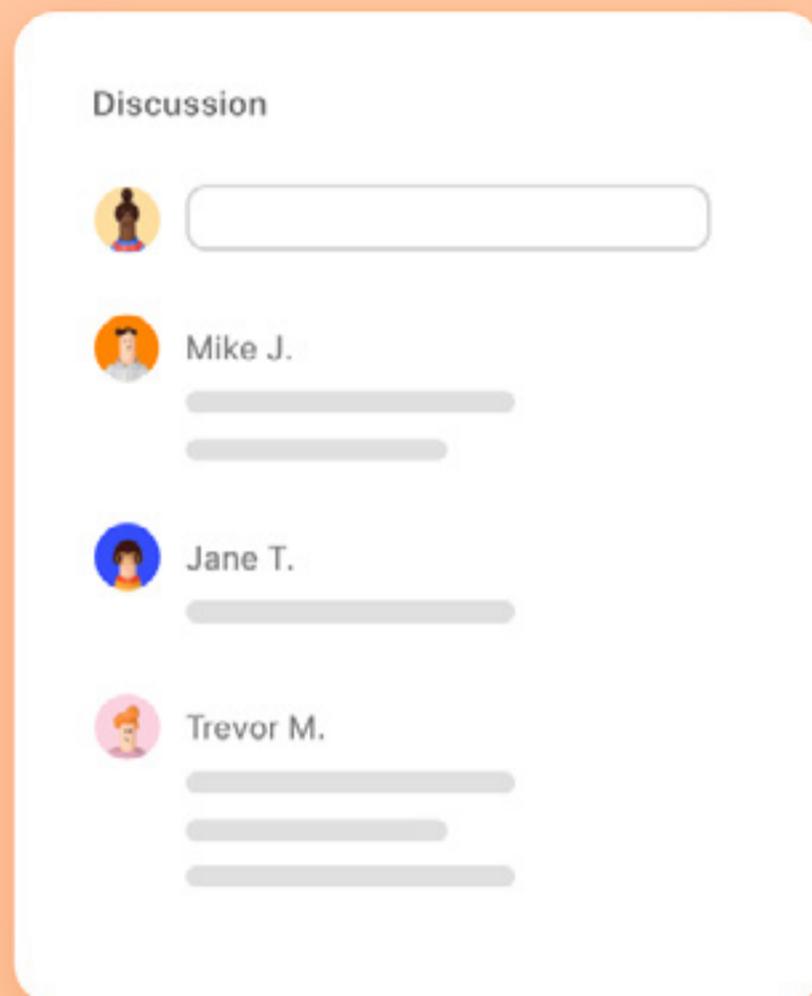
To communicate or to miscommunicate

One of the cornerstones of efficient remote operations is communication. From vital notifications and dispatches to chitchat, you need to be able to provide your teams with smooth information flow. And that's where your favorite chat app probably falls short.



A good collaboration platform is there to give structure to your internal communication and help you make sure every important piece of information is properly organized, easily accessible, and always available. There's a Discussions section in every project that can be used for brainstormings, Q&As, and generally, going deeper into specific topics that are not necessarily related to any individual task.

The same sort of conversation can be done on tasks, and that's how you make sure important information is not scattered across chats and emails. All communication related to a particular activity is exactly where it's supposed to be - in that particular task.

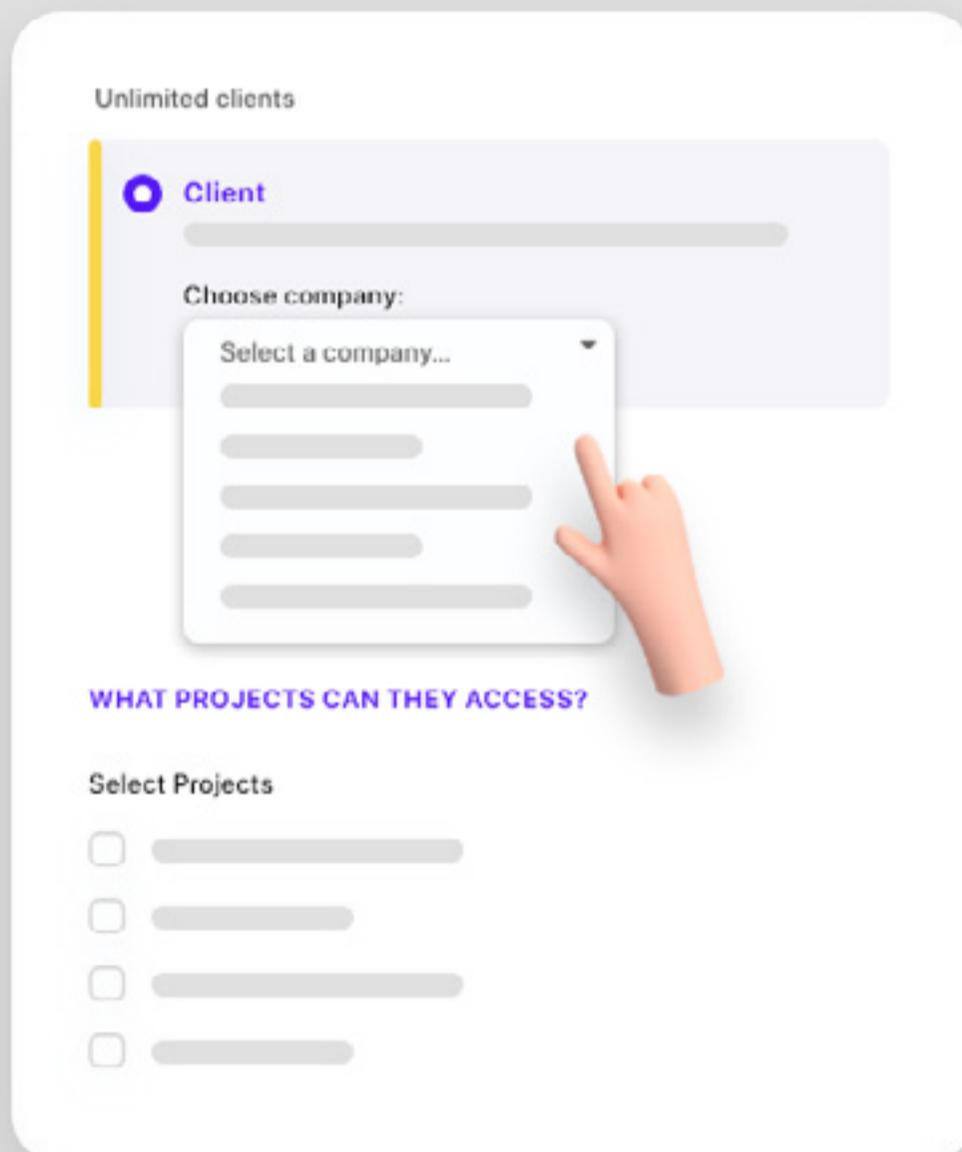


ActiveCollab takes a similar approach to files - you're able to upload them on a project level, or add them in a task or discussion to make them more accessible to all stakeholders.

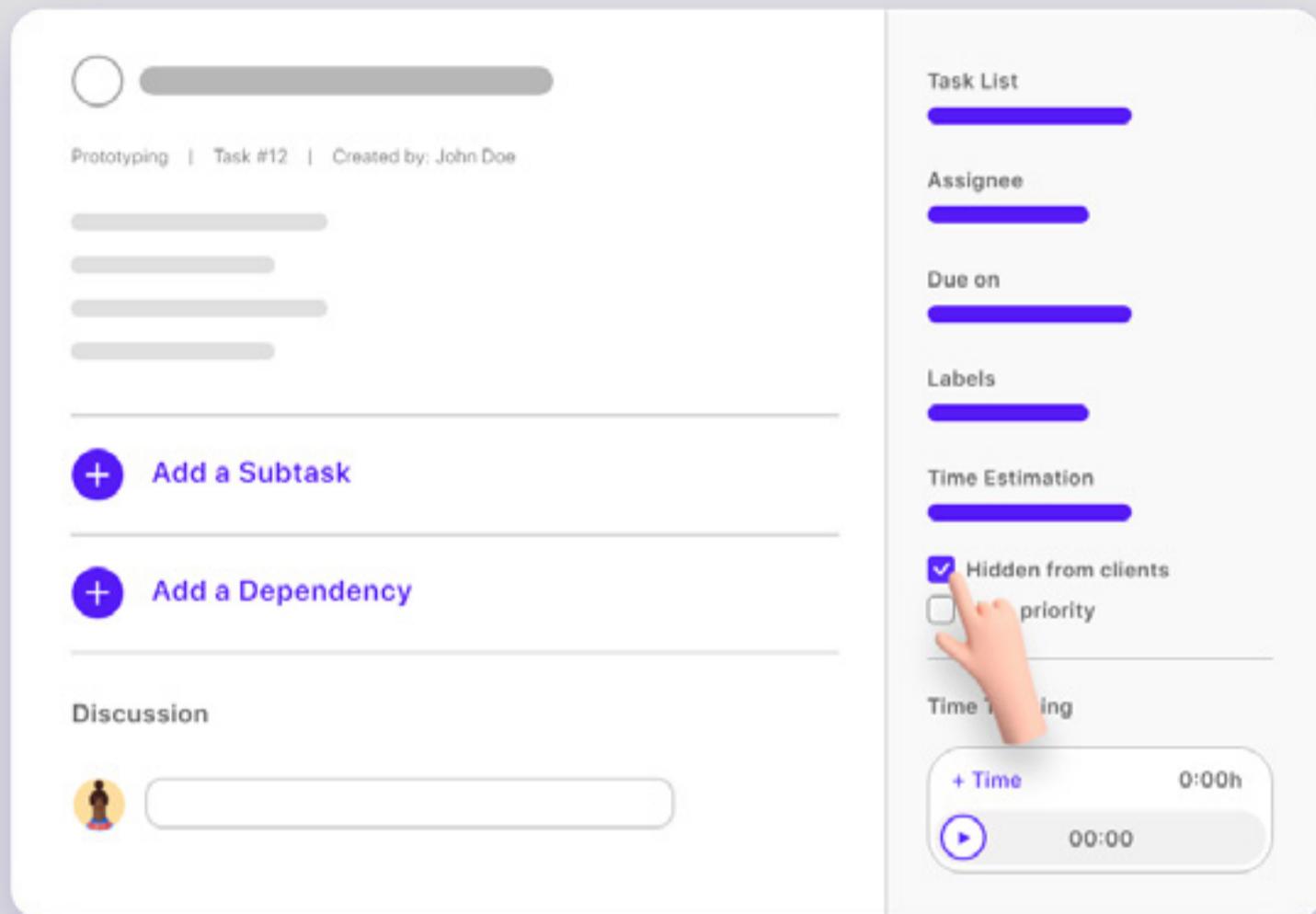
This means that using ActiveCollab you'll be able to create a seamless pipeline for discussing and executing all projects and tasks, making sure that the entire team is involved, engaged, and connected.

Deliver exceptional client service

With all these collaboration options, it's actually a very good idea to also **invite your clients** to ActiveCollab. A centralized platform for all client-related work and communication reduces the noise created by scattered messages which can save you precious time and make your client work a lot easier.



You'll finally be able to stop playing the telephone game by sharing real-time progress with your clients and giving them access to all relevant information - what you're working on and how much you're left to do.



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There's no need to arrange calls and meetings to discuss every little detail. You can give feedback and collaborate directly in ActiveCollab, making the feedback loop much faster and making sure your projects never run late anymore.

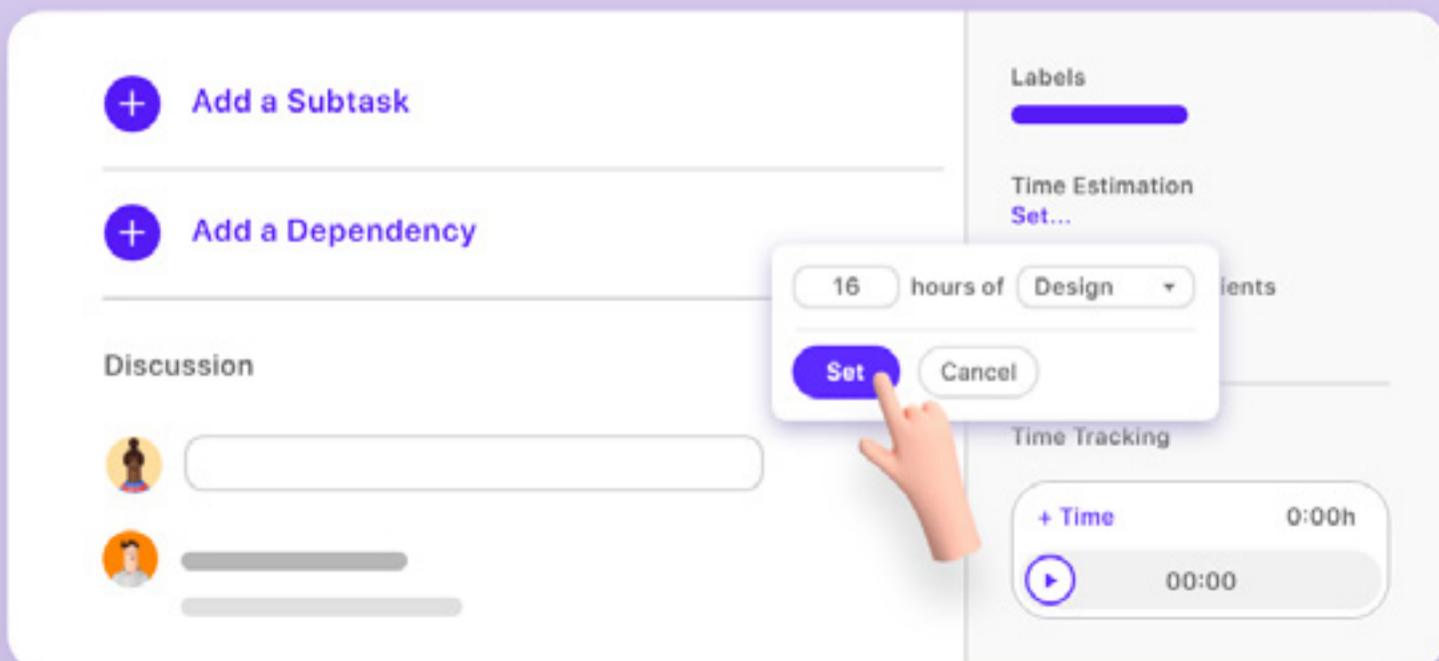
And do you know what's the best thing? **All clients are free of charge!** This means that you can potentially end up with hundreds of clients in your workspace and they're all free.

Make every hour count

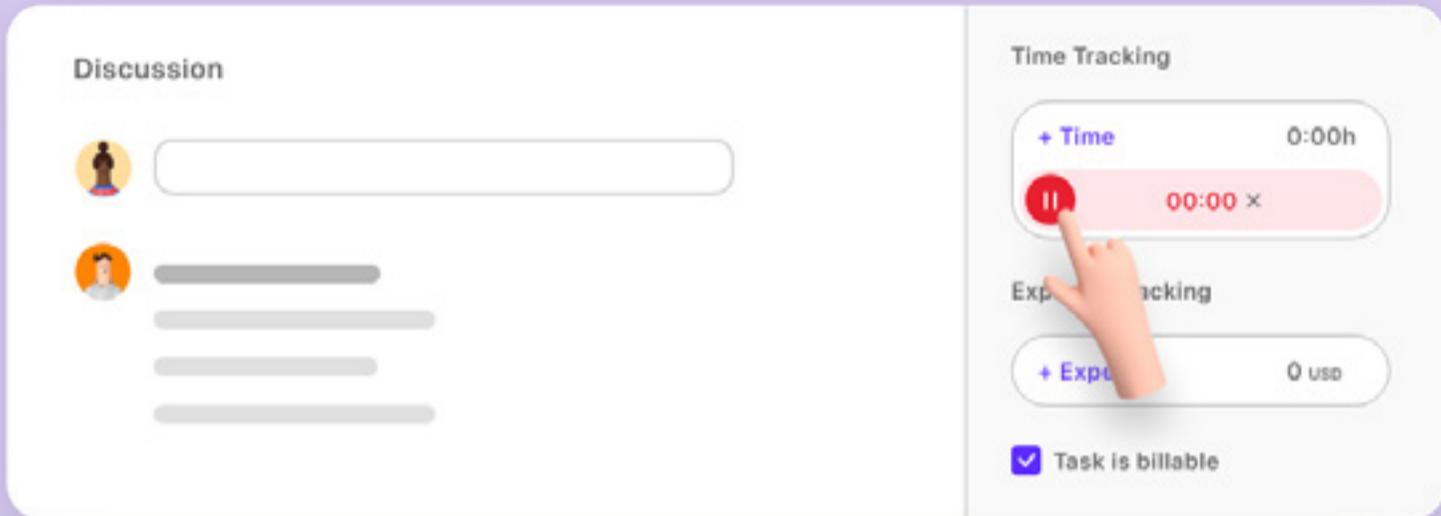
When your workspace is set up and your team is up and running, it's time to make sure that every work-hour went where expected. After all, remote work is particularly challenging when it comes to having a clear overview of your team's activities. And it's all about accountability, not about standing over somebody's shoulder.

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First off, start by mapping and scheduling your entire work-week using **time estimates**.

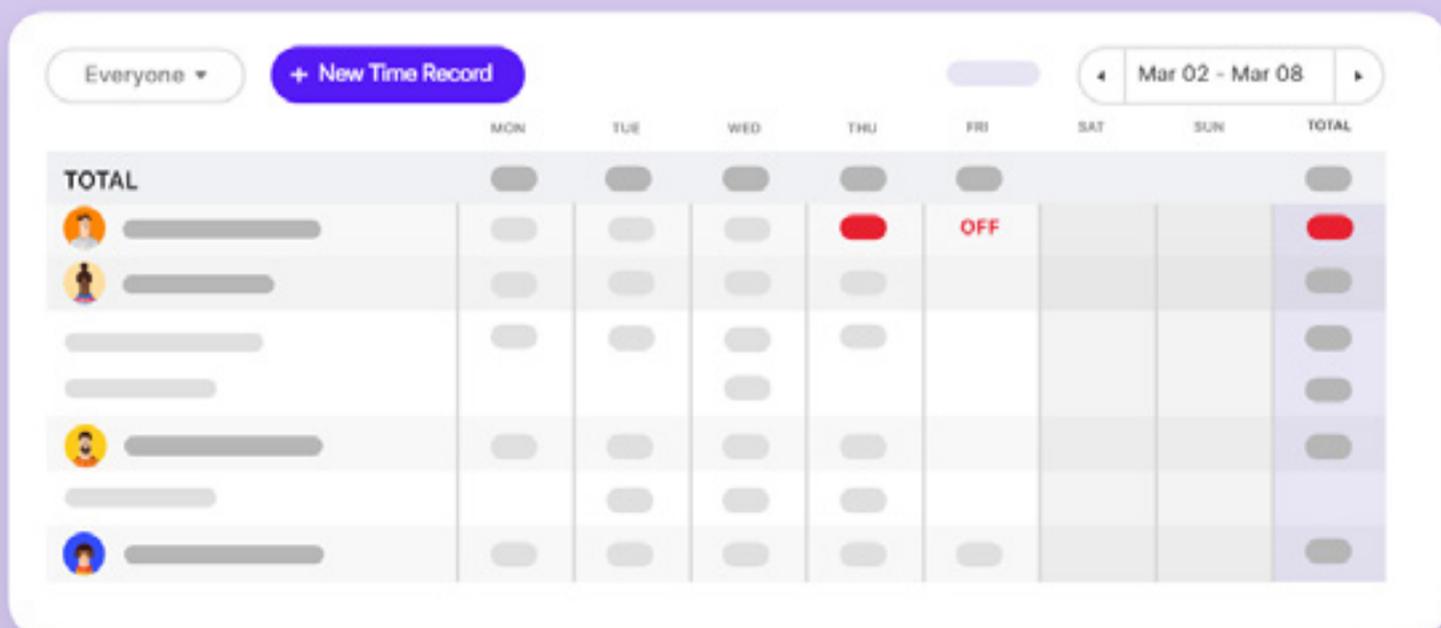


After you're set, you can measure precisely how much time your team is spending on tasks using the **Stopwatch**. When activated, the stopwatch continues running in the background without interrupting your workflow.

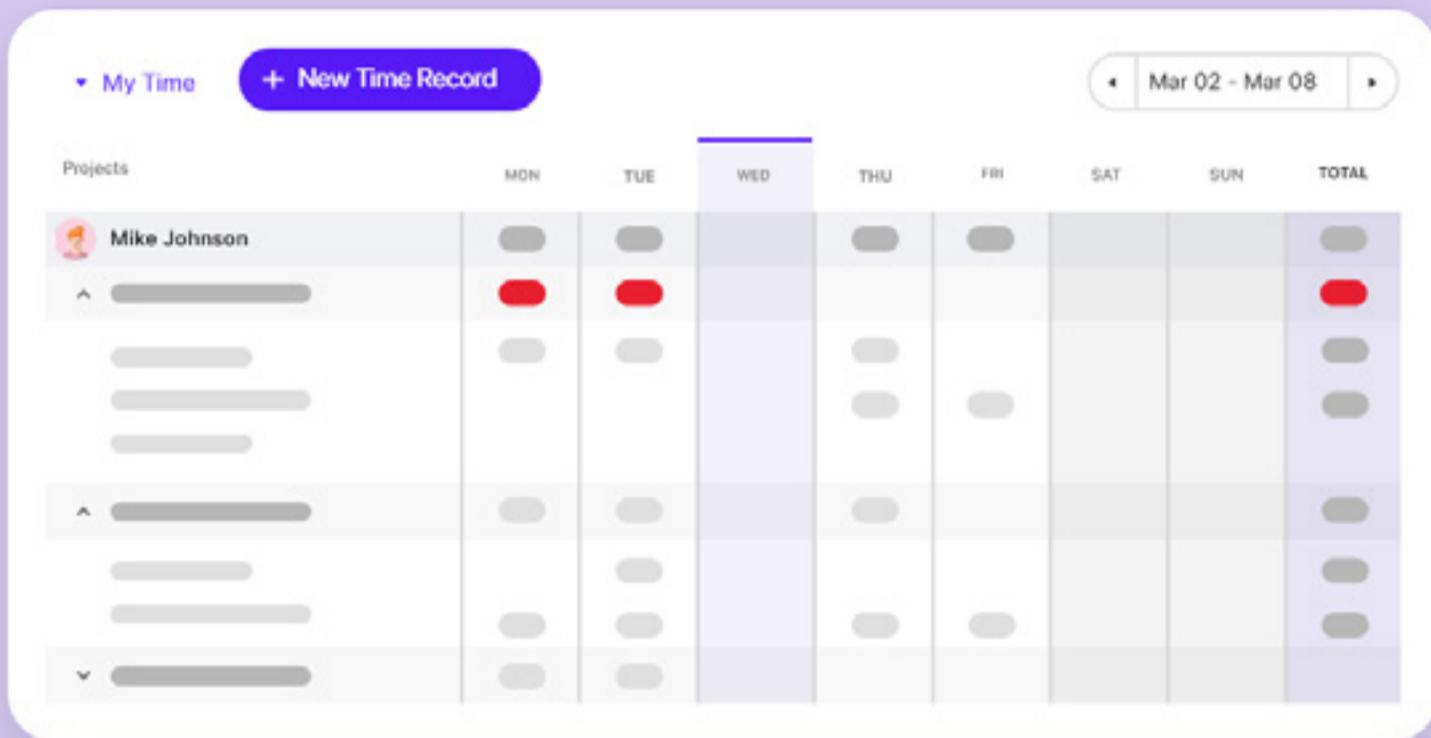


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After the team submits their stopwatches you can enjoy a visual overview of all time records using the team Timesheet. **ActiveCollab Timesheet** gives you a weekly summary of all tracked hours across by your team members across all projects. This way, you'll have a clear insight into the utilization of your team by comparing their tracked hours with daily capacities.



Furthermore, each team member has their own **personal timesheet** located in the My Time section of the My Work tab, which is perfect for managing their personal assignments and priorities.



Make sure you charge every hour!

After you've taken care of the time, make sure you invoice every hour of your work by invoicing billable time records across all tasks and projects. You can do this very easily in one of two ways - you can **create invoices** from your billable time records, or enter a fixed amount you agreed upon with your clients.

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ITEMS TO BE BILLED

Free-form Invoice
 [Redacted]
 [Redacted]

#	Description	Quantity	× Cost	= Amount	Tax
1	Web Design	1.00	1000.00	1000	No Tax ▼
2	Logo Design	1.00	100.00	100	VAT (20%) ▼

+ Add Item Item Templates ▼

Discount amount (%)

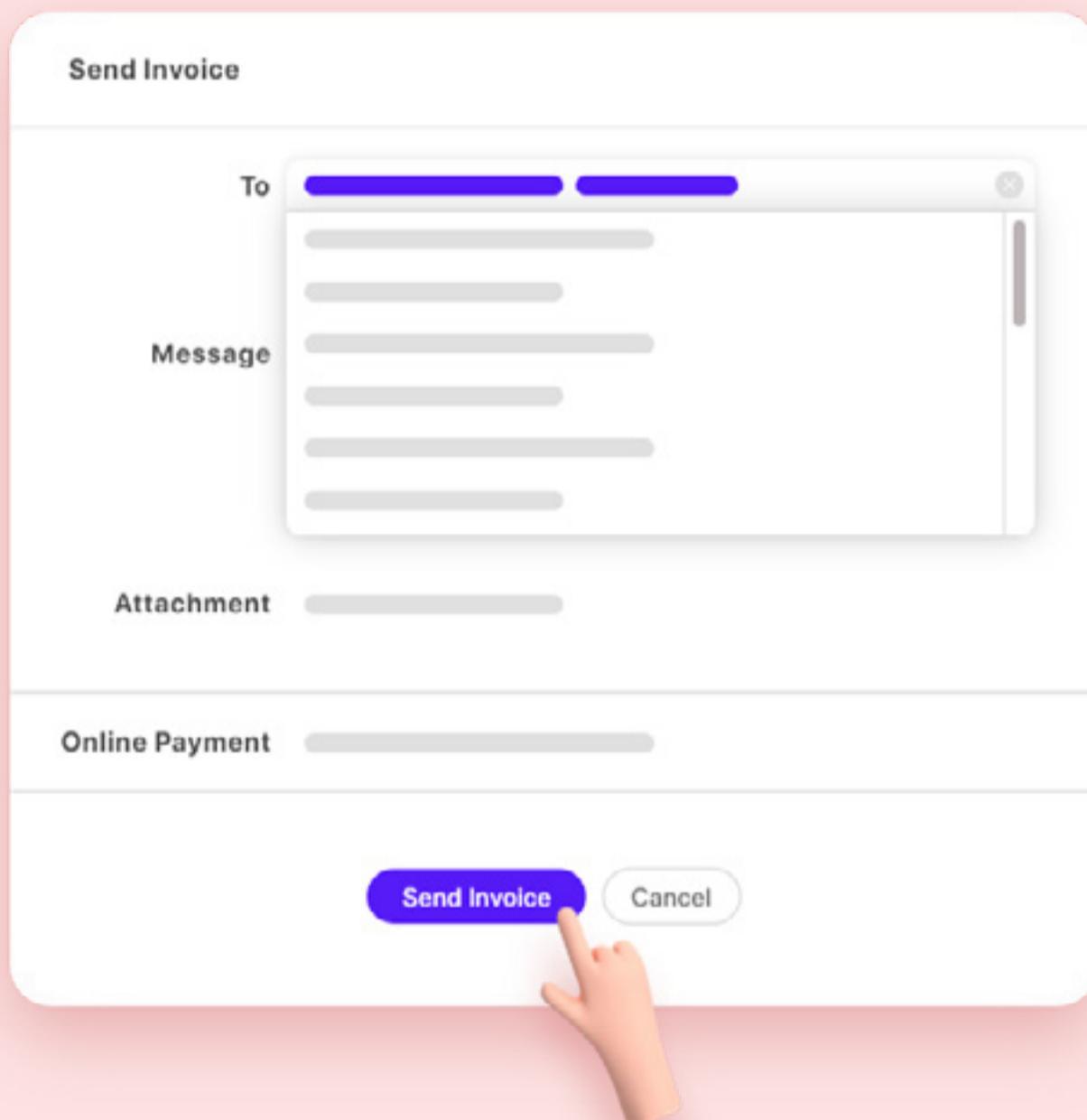
Subtotal	1100.00
VAT (20%)	20.00
Total Amount	1120.00

Add a Note

Add a private comment that clients can't see

Create Invoice Cancel

After you list all items on your invoice you can Add business info and your branding using the Invoice Designer and **send invoices** directly from ActiveCollab.

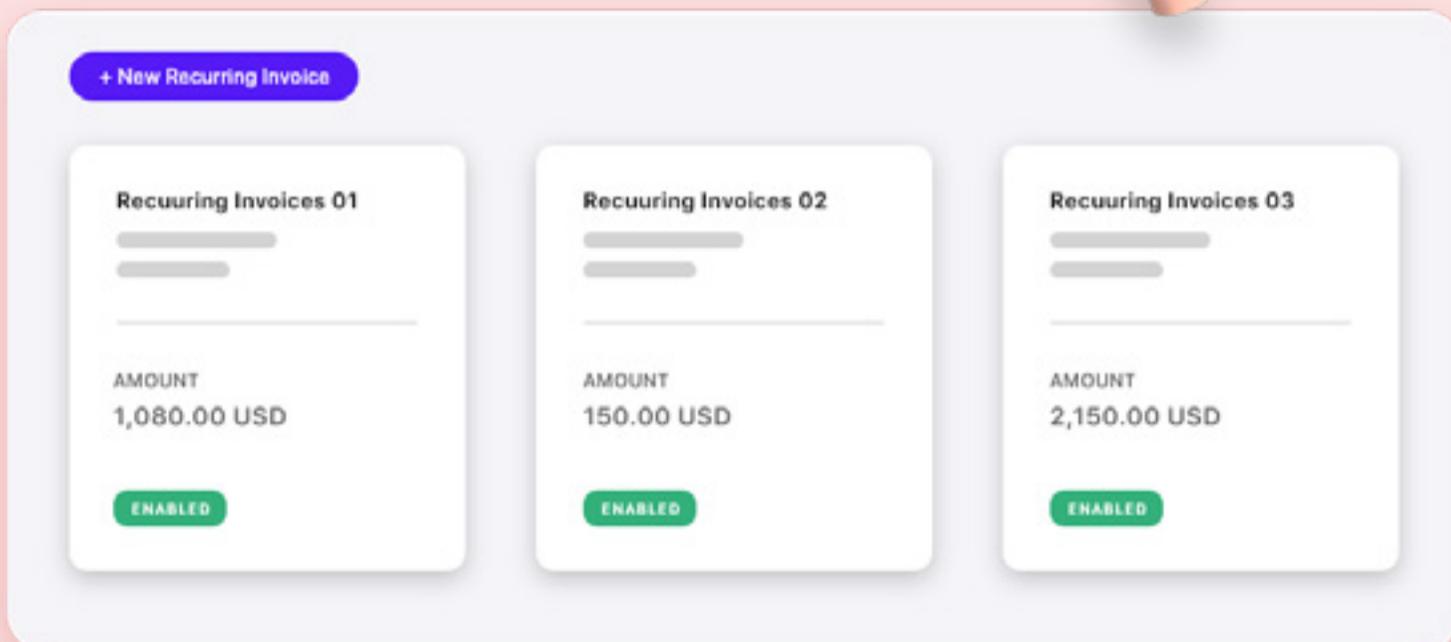
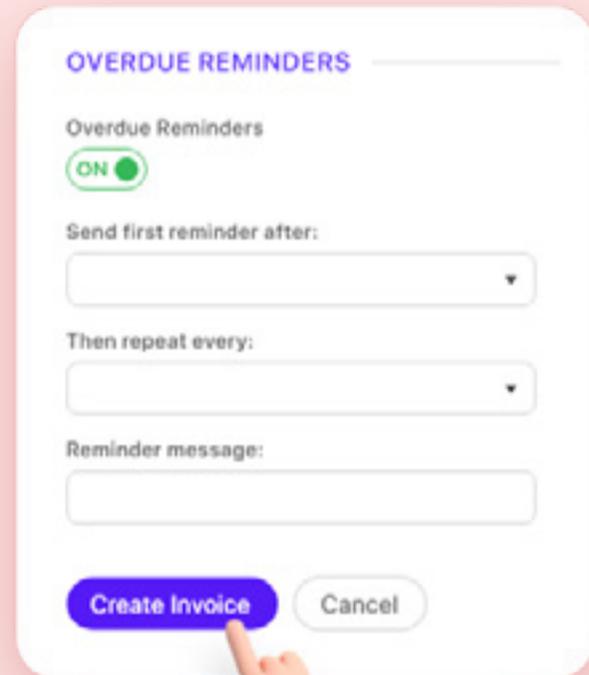


What makes this system so handy is the option to enable online payment gateways for your clients so you can receive payments instantly after issuing invoices.

Save even more time without chasing payments

Instead of having to personally remind your clients, you set up an **automatic reminder** when their payments go overdue.

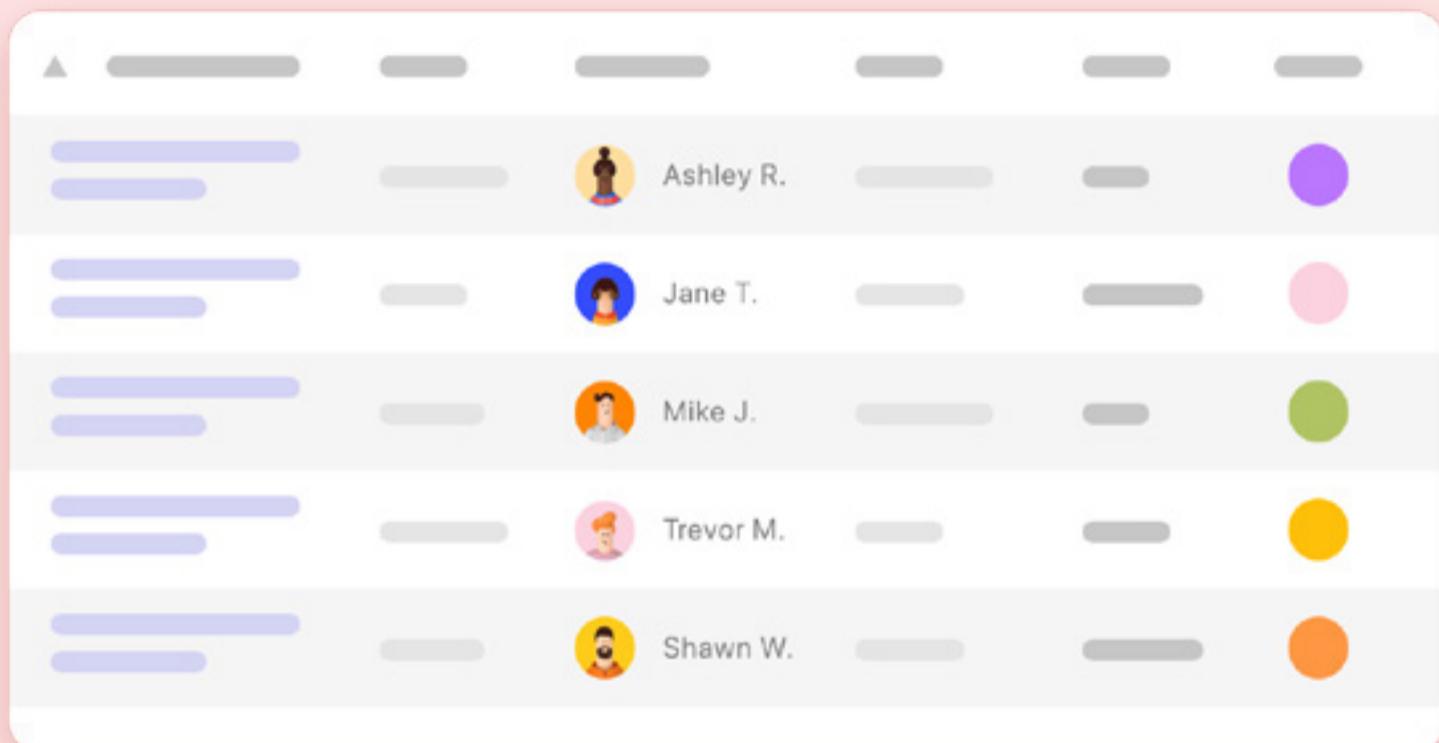
Additionally, it's very easy to set up **recurring invoices** for clients you have on a retainer and send them automatically each week or month.



Furthermore, if you're already using a different bookkeeping software such as Xero or Quickbooks, you can create invoices from those tools with the time records you created in ActiveCollab.

Sit back and choose your favorite report

In addition to all task management, team collaboration, time tracking, and invoicing features, ActiveCollab also comes equipped with loads of powerful reports.



If you want to stay updated with activities across all tasks and projects, use the **Task Report**. If you're looking at a detailed overview of every time record that can be filtered, sorted, and neatly organized, you'll love the Time Report. And ultimately, if you want to know how much your projects cost and how much money they're bringing in, every project has its own compacted Profitability Report.

Afterthought

Going fully remote is not a simple process but it's much less daunting when you calmly assert the situation and see what you need to set up in order for all pieces to come together. These unforeseen circumstances have probably made the situation worse since we're now forced to accommodate without truly thinking about it in the past. But we are certain that there's nothing to fear, especially if you've armed yourself with a bit of patience, trust, and a good toolkit.



Make Real Work Happen,
Remotely!