Getting Started

Role-Based Checklist

CORE Owner/Admin

- [ ] 1. Set up your Company profile.
  Settings > Company
- [ ] 2. Purchase and manage CORE subscriptions.
  Settings > Company > Manage Subscriptions
- [ ] 3. Assign and manage CORE users.
  Settings > Access & Permissions > Manage Users
- [ ] 4. Assign security profiles and permissions to users.
  Settings > Access & Permissions > Security Permissions
- [ ] 5. Specify other company-wide/global settings.
  Settings
- [ ] 6. Set up activities and expenses.
  Settings > Time & Expenses > Activity/ Expense Items
- [ ] 7. Set up your own user preferences.
  User Settings
- [ ] 8. Create Contacts
  Contacts > Employees/Vendors and Clients. (optional)

Project Managers

- [ ] 1. Specify global/company-wide project settings.
  Settings > Projects
- [ ] 2. Set up your own user preferences.
  User Settings
- [ ] 3. Create client profiles and their contacts.
  Contacts > Clients
- [ ] 4. Create projects and templates .
  Projects
- [ ] 5. Set up project rules and options.
  Project > Details

Time & Expense Users

- [ ] 1. Set up your own user preferences.
  User Settings
- [ ] 2. Enter your time on projects and activities.
  T&E > Time Card/Time Entries/Timers
- [ ] 3. Enter your expenses on projects.
  T&E > Expense Entries
- [ ] 4. Submit your time and expenses for approval.
  T&E > Time Entries or Expense Entries

Billing Managers

- [ ] 1. Specify global/company-wide A/R settings.
  Settings > Billing & Invoices
- [ ] 2. Set up your own user preferences.
  User Settings
- [ ] 3. Create manual invoices.
  Billing > Invoices > Manual Invoice
- [ ] 4. Create batch invoices.
  Billing > Invoices > Invoice Batch
- [ ] 5. Record client payments.
  Billing > Payments

Accountants

- [ ] 1. Specify global/company-wide accounting settings
  Settings > Accounting
- [ ] 2. Set up your own user preferences.
  User Settings
- [ ] 3. Create a chart of accounts.
  Accounting > Chart of Accounts
- [ ] 4. Create vendor bills.
  Accounting > Payables > Vendor Bills
- [ ] 5. Make vendor payments.
  Accounting > Payables > Bill Payments

CRM Users

- [ ] 1. Create global/company-wide CRM profiles and templates.
  Settings > CRM
- [ ] 2. Create CRM lists.
  Settings > CRM
- [ ] 3. Set up your own user preferences.
  User Settings
- [ ] 4. Create leads and prospects.
  CRM > Leads and Prospects
- [ ] 5. Create opportunities and quotes.
  CRM > Opportunities and Quotes

HR Users

- [ ] 1. Create global/company-wide HR lists.
  Settings > HR
- [ ] 2. Set up your own user preferences.
  User Settings
- [ ] 3. Set up benefits for employees.
  HR > Benefits and Contacts > Employees > Details
- [ ] 4. Create review templates and performance reviews
  HR > Reviews