Post-Kickoff Activities

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For each business level and site level, go to the Home > General tab and view/update site and contact information.

- Home > General Overview
  - Site Name
  - Site Address
  - Site Phone Number
  - Contact Name
  - Contact Email
  - License Information

Add your Tax ID number, this will display on statements!

- General Config Settings
  - Go to setup > system config, then select General Config. The first field will be Tax ID. Add number, scroll to the bottom of the page and press Apply All

Start to think through user group and what activities you would need them to do within the system. Customized roles can be setup by going to setup > admins, then select Setup Roles.

- Setup Roles Overview

Confirm available training times and dates with implementation specialist! View our training checklist here to get started learning the system with self-exploration!