CutTime Onboarding
CHECKLIST for Higher Ed

Your success is our success. We are excited for you to begin your onboarding journey with us. Use this suggested checklist as a rough guide for your new account set up, as each fine arts program is unique in their operations and needs. Refer to our help articles and videos for additional guidance.

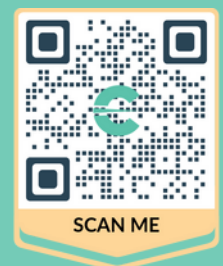**Let's get started - your NEW Fine Arts Toolbox awaits.**

Review our Onboarding Guide <u>here</u> to view specific articles and videos related to set up tasks.

STEP 1: PREPARING AND ACTIVATING ACCOUNTS

- ☐ Review CutTime Import Templates and prepare your program's data
- ☐ Activate your new CutTime Administrator Account credentials
  then log in to CutTime via app.gocuttime.com and go to Program Dashboard
- ☐ Add additional authorized users if appropriate for your program(s):

  ☐ Teachers   ☐ Helpers

STEP 2: IMPORTING & SET UP

- ☐ Import your program data into the CutTime import templates

  ☐ Students (Active)   ☐ Inventory (Instruments, Library, and Equipment)
  ☐ Attire   ☐ Finances (Account Balances)

- ☐ Create Groups and Assign Student Members and Positions within each group
- ☐ Set up your Inventory Locations and adjust data within Inventory data if needed
- ☐ Assign Inventory to Students and send rental agreements if applicable
- ☐ Add Inventory Repair data and documents where applicable
- ☐ Create upcoming Events (single or series)
- ☐ Create Starting Account Balances for your Student Members
- ☐ Create a Stripe Connect Account to Accept Online Payments

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CutTime

STEP 3: COMMUNICATING

You can find specific Welcome to CutTime Communication Kits here

- [ ] Send 'Welcome to CutTime' Emails and distribute Flyers to stakeholders

    - [ ] Staff / Teachers
    - [ ] Helpers
    - [ ] Students*

Distribute these materials prior to sending the 'Welcome SMS Magic Link" to members

- [ ] Compose your first weekly Announcement and validate receipt in the SMS Dashboard

- [ ] Use "Intro to CutTime" presentation at Recruitment and/or other key Update Meetings

You can find the CutTime Branding Kit with templates here

- [ ] Update your organization's website and program handbook with our materials

    - [ ] CutTime Logo w/description
    - [ ] Member's Magic Link details
    - [ ] CutTime website URL
    - [ ] CutTime Market details

- [ ] Post social media announcements to spread the word about CutTime

- [ ] Put up CutTime posters inside your classroom and other fine arts spaces

- [ ] White list CutTime's IP domains to ensure you receive important email notifications

STEP 4: REVIEWING AND FEEDBACK

- [ ] Confirm all of your organization's program data is in the right spot

- [ ] Ensure teacher, and/or designated helpers have activated their user credentials (if needed you can resend the activation link to them from the Users section under Settings)

- [ ] Review your Stripe Connect reports to ensure everything is accurate

    - [ ] Bank Payout Report
    - [ ] Individual Account Transactions Report

- [ ] Give us feedback on your CutTime onboarding experience and tell us about your additional learning needs here

NEED HELP?   Visit our Online Help Center or chat with us

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