CutTime Onboarding
CHECKLIST for K12

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):
  - [ ] Co-Administrators   - [ ] Boosters
  - [ ] Teachers   - [ ] Helpers

STEP 2: IMPORTING & SET UP

- [ ] Import your program data into the CutTime import templates
  - [ ] Students (Active)   - [ ] Inventory (Instruments, Attire, Library, and Equipment)
  - [ ] Adults (Guardians)   - [ ] Finances (Account Balances)

Make sure all Students have an assigned Guardian, You can assign multiple guardians to a student if needed.

- [ ] 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) and add Volunteer Jobs
- [ ] Create Starting Account Balances for your Student Members
- [ ] Create a Stripe Connect Account to Accept Online Payments

SCAN ME
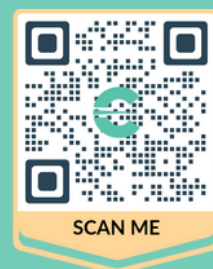
STEP 3: COMMUNICATING

You can find specific Welcome to CutTime Communication Kits <u>here</u>

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

  - [ ] Staff / Teachers
  - [ ] Parents-Guardians & Students*
  - [ ] Booster Club Members
  - [ ] Helpers

*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 <u>here</u>

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

  - [ ] CutTime Logo w/description
  - [ ] CutTime website URL
  - [ ] Member's Magic Link details
  - [ ] 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, booster club member, and/or designated helpers have activated their user credentials (if needed you can resend the activation link to them from Users 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 <u>here</u>

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

CutTime