OnTime Setup Checklist

Use this checklist to ensure that important areas of OnTime are fully set up. All page references are to the *OnTime User Guide*.

Step 1
Add Users

- ☐ Add new User and configure information (p.19)
    - ☐ Repeat for each desired user

Step 2
Add Locations and Zones

- ☐ Add Locations (p.25)
    - ☐ Import locations in bulk from CSV or Excel file(s)
    - ☐ Add individual locations manually from the Locations list
    - ☐ Repeat for each desired location
- ☐ Add Zones (p.25)
    - ☐ Import zones in bulk from CSV or Excel file(s)
    - ☐ Add individual zones manually
    - ☐ Repeat for each desired zone

Step 3
Add Customers

- ☐ Add Customers (p.29)
    - ☐ Import customers in bulk from CSV or Excel file(s)
    - ☐ Add individual customers manually
    - ☐ Create any necessary sub accounts from the Contacts section
    - ☐ Repeat for each desired customer

Step 4
Configure Pricing

- ☐ Create price set (p.31)
    - ☐ Repeat for all desired levels of service
- ☐ Establish a base price (p.35,36,43)
    - ☐ Repeat for all desired levels of service
- ☐ Create any necessary price modifiers (p.43)
    - ☐ Repeat for all desired accessorial charges
- ☐ Link price modifiers to the appropriate price sets (p.52)
    - ☐ Repeat for all desired connections between levels of service and accessorial charges
- ☐ Link the price sets to the appropriate customers (p.54)
    - ☐ Repeat for all appropriate customers

Step 5
Setup Notifications

- ☐ Create and configure a new Workflow Action (p.56)
    - ☐ Repeat for each desired notification

Step 6
Configure Company Settings

- ☐ Configure company settings (p.63)

Step 7
Test, Test, Test

- ☐ Test the entire system to ensure you are production ready (p.65)
    - ☐ Test dispatcher tasks
    - ☐ Test driver tasks
    - ☐ Test notifications
    - ☐ Test prices
    - ☐ Test customer tasks
    - ☐ Test billing

You're ready to start using OnTime!