

# 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.**

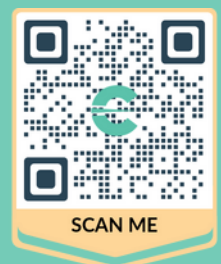
Review our Onboarding Guide [here](#) to view specific articles and videos related to set up tasks.

## STEP 1: PREPARING AND ACTIVATING ACCOUNTS

- ☐ Review CutTime Import Templates and prepare your program's data (*go to Import Data side nav link*)
- ☐ Activate your new CutTime Administrator Account credentials that were sent to your email address *then log in to CutTime via [app.gocuttime.com](http://app.gocuttime.com) which will display your Program Dashboard*
- ☐ Click on 'Users' in the side nav to add additional authorized users if appropriate for your program(s):
  - ☐ Teachers
  - ☐ Helpers

## STEP 2: IMPORTING & SET UP

- ☐ Click on "Import Data" in the side nav to import your program data using the CutTime templates
  - ☐ Students (Active)
  - ☐ Inventory (Instruments, Library, and Equipment)
  - ☐ Attire
  - ☐ Balances (for Members)
- ☐ 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 a Stripe Connect Account to Accept Online Payments\*
- ☐ Set Up Your Simple Raise Store and Fundraisers



## 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
  - ☐ Students\*
  - ☐ 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 [here](#)

- ☐ 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 staff 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](#)

**Fundraising, stores, and ticketing are powered by our sister platform, Simple Raise. ZERO Fees, You Keep 100%!**  
Use your CutTime credentials to access it all.

**Simple♥Raise**

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

