Go-Live Checklist

Your official Go-Live date should be the date that your setup is complete, and your organisation is ready to officially begin using Synergy. We have created the following checklist to give you an outline of what you should complete by the Go-Live date:

- [ ] **Organisation and Profiles**
  Add phone and address details. Upload a profile picture and company logo.
- [ ] **Contacts**
  Create records for all clients, suppliers and external project contacts.
- [ ] **Rates and financials**
  Update the charge-out rate values and add additional rates if required.
- [ ] **Staff**
  Create a staff record for each employee and upload a profile picture (or staff can upload their pic later).
- [ ] **Projects**
  Add projects to define tasks, track staff time and invoice the completed work for billable projects.
- [ ] **Timesheets**
  Track time spent on project tasks, enter timesheets and submit expense claims.
- [ ] **Templates**
  Edit the default folder structures and customise the sample templates to include your branding and details.
- [ ] **Invoices and bills**
  Create project invoices, enter invoice payments and record supplier bills or office item expenses.
- [ ] **Document Management**
  Discuss how to create and share documents from Synergy.
- [ ] **Reports**
  Learn to create, customise and share reports.
- [ ] **Accounting add-ons**
  Wiise, Sage 50 and Business Central.

If you would like to schedule any additional training or have any questions or concerns prior to your Go-Live date, please reach out to your Customer Success Manage who can assist you with your queries.