

Task	Menu	Screen	Tab/Table	University
Education Materials				
1.0 Onboarding New Clients Webinar				
This webinar covers what makes a successful onboarding process and key mistakes to avoid.				New Client Onboarding
Sales Setup				
2.0 Create Opportunity Status	Setup	Setup Tables	Opportunities	Opportunities Status
Create an Opportunity Status called "Won - New Client".				Opportunity Status Setup Table
2.1 Create Workflow Rule	Other	Marketplace	Workflow	CW: Opportunity - Won and New Client
Create a Workflow Rule to notify when an opportunity is saved to a status of "Won-New Client". Import the Workflow Rule from the Marketplace				Create Workflow Rule
Project Setup				
3.0 Create Project Board	Finance	Setup Tables	Project	Project Board
Create a Project Board to manage your onboarding projects. The recommended statuses to begin with are: Open Scheduled On Hold In Progress >Completed				Project Board Setup Table
3.1 Create Onboarding Project Template	Other	Marketplace	Project Template	CW: New Client On-Boarding
Create a project template to standardize the onboarding process. Import a sample project plan from the Marketplace.				Onboarding Project Template
3.2 Create Onboarding Track	Other	Marketplace	Track	CW: New Client Welcome
Create a track to automatically notify the client of key information throughout the onboarding process. Import a sample onboarding track from the Marketplace.				Create Onboarding Track