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# Quick Start Implementation Kit



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If you're pretty confident you're ready to use Core but want to make sure you have a solid understanding of the basics, then this kit is perfect for you. The individuals who supervise Core in your company should attend all sessions.



## Training Courses:

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### Setup and Customizing Preferences

Hours 2

- Learn how to set up Core defaults including account setup, basic Core navigation, company setup, general company and user preferences, including user security to be aligned with your firm's policies. — Employees who are setting up these items should attend
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### Foundation Set-Up Training

Hours 2

- Learn how to set up Core defaults including, users, and required field information, security and general company preferences to be aligned with your firm's policies. You will set up and understand the foundations of Core for successful business management.
- *Employees who are setting up these items should attend.*

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### Project Setup

Hours 2

- Learn how to set up active projects (hourly, fixed fee and internal); including building project details, teams, phases, job codes, invoice method and setting up budgets for both fees and time.
- *Employees who are responsible for setting up and managing projects should attend.*

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### Time and Expense Entry

Hours 2

- This course covers the fundamentals of how to enter time and expenses through the different options we offer in Core. This course is designed for your staff so they understand and develop good time and expense practices for efficient and accurate time entry. We'll be sharing some tips and tricks to enhance their day to day task of entering time.
- *Employees who are recording time and expenses in Core should attend.*

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### Billing in Core

Hours 2

- Learn how to set up the key aspects of billing: Clients, Projects and Global Settings. We discuss your existing pre-billing process and learn how to create invoices, enter payments and review important billing reports.
- *Employees who are responsible for pre-billing analysis, billing or post-billing analysis should attend.*

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## Total Training Hours Included

10

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