



Setup Guide: Order of Operations

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2. My Company > [Business Units](#)
3. My Company > Service Hours & Holidays
4. My Company > Service Territory
5. My Company > Roles & Permissions (Standard and Mobile Options)
6. My Company > Timesheets
7. My Company > Employees & Teams > [Rate Sheets](#)
8. My Company > Employees & Teams > Employees
9. My Company > Employees & Teams > Employees > Rate Sheets
10. My Company > Employees & Teams > Teams
11. Configurations > Categories (Products, Materials, and Service Offerings)
12. Configurations > Materials Usage
13. My Company > [Property Traits](#)
14. My Company > [Products & Materials](#)
15. My Company > [Service Offerings & Packages](#)
16. My Company > Reports & Forms
17. My Company > Online Booking
18. Configurations > Billing
19. Configurations > [Standard Fields](#)
20. Configurations > [Custom Fields](#)
21. Configurations > [Zones](#)
22. Configurations > [Marketing Campaigns](#)
23. Configurations > Work Order Sub-status
24. Configurations > Renewals
25. Configurations > Mobile Verification

Accounts, Leads, and Opportunities can now be added.