Cascades Setup Guideline

**The Setup Wizard will guide you all the way up to
the point where you set Assignee Permissions**

1 | **Company Setup** | The System created yourself as the 1st System Administrator allowing you unrestricted Access to the System.

2 | **Folders** | The System allows for the Uploading of Public and Private Files in the Cloud. Public Files can be accessed by an Assignee having access to the relevant Contact.

Task Activity Groups | Task Groups can be created to group and link Task Activities of a similar nature e.g. Taxation in an Accounting Practice.

Task Activities | The Task Activities in the Taxation Group could include ITR12, ITR14, IT14SD, IRP6 etc.

Contact Categories | The Normal Default Contacts Categories in a Business are Customers, Suppliers, Prospects etc. Sub Group Classifications can also be applied.

Contact Regions | Contacts can be linked to Regional classifications i.e. by Country, Province and City.

3 | **Assignee Setup** | Task Messaging - Task Messaging can be activated e.g. when the progress of a Junior Assignee needs to be monitored.

4 | **Assignee Permissions** | Permission Settings controls the Access to Contact Categories, Editing Rights, Access to certain Functionality and Access to other Assignees.