

Cascades Setup Guideline

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

The Setup consist of 4 Major Components

1. The CompanySetup Defaults
2. System Defaults
3. Assignee Setup
- 4 Assignee Permissions

1

Company Setup

The System automatically creates yourself as the 1st System Administrator allowing you Unrestricted Access to the System.

2

Folders & Files

This function allows for Cloud Storage of 1) Public (shareable) Folders and Files and 2) Private Files and Folders.

Task Activity Groups

An Accounting Practice could e.g. have Task Groups consisting of Tax Returns, Secretarial, AFS etc.

Task Activities

Task Activities e.g. ITR12, ITR14, DTR02, IRP6 etc. would then be linked to the Task Group "Tax Returns"

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 by Country, Province and by City. Import the relevant Country if you wish to use classification.

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 all the Access of an Assignee to other Assignees and access to all the other Functionality of Cascades.

You are now ready to start the real power of Cascades I

Arrange a Meeting with All Assignees by sending them a Message

You need to Delegate !

1. The Assignees responsible to create the Contacts in the different Contact Categories
2. The Assignees responsible to create all the Recurring Tasks -
 - this might be a high level activity to be performed by yourself after the creation of the Contacts

Create a Normal Task, activate Task Tracking, set a Due Date for Completion, apply Advanced Warning, supply any relevant instructions and allocate the Task to the responsible Assignee.

The ToDoList of each Assignee will be populated with all Recurring and Non-Recurring Tasks. The System Administrator and Supervisor of the Assignee has full access to the ToDoList of an Assignee to monitor progress and productivity.