

This System Setup Checklist is your guide to help you set up and use your CoreBridge System. You should use it to chart your progress through the onboarding and training process.

Getting Started

- ❑ View the **Welcome to CoreBridge Training** video. This is found both in the Training Module and your **Welcome to CoreBridge - Training & Login Information** email.
- ❑ This email also includes your CoreBridge system login information. If you have further questions email training@corebridge.net

Complete Training

- ❑ STEP 1: Welcome to CoreBridge Training
 - ❑ View the 6 minute overview video that you received in your **Welcome to CoreBridge - Training & Login Information** email. You can also access this video within your CoreBridge system by clicking the ? icon, then selecting Training Guide.
 - ❑ Learn how to use the [Training Guide system](#)
 - ❑ Cover key topics
 - ❑ Create an account on support.corebridge.net
 - ❑ Open Question & Answer
- ❑ STEP 2: Interactive Training (Self-Paced)
 - ❑ Complete all the recommended guides in your CoreBridge system up to the first live training link.
 - ❑ Use the links to register for the live training sessions.
- ❑ STEP 3: Live Training - Pricing Templates & Parts (75 minutes)
 - ❑ This is a live training session, not self-paced
 - ❑ Learn how to use and setup pricing templates and parts
 - ❑ Create your own pricing templates and parts
 - ❑ Associate modifiers with parts
- ❑ STEP 4: Interactive Training (Self-Paced)
 - ❑ Complete all the remaining necessary guides.
- ❑ EVERY WEEK: Training Q&A Sessions (50 Minutes)
 - ❑ Attend the weekly open Question & Answer sessions to get answers to your questions while you follow your Interactive Training Path.
 - ❑ You can register for as many or as few as you would like.
 - ❑ We **STRONGLY** recommend you attend these on a weekly basis to get answers to your questions.

Go Live

- ❑ [Click on this link](#) to schedule your Go Live
- ❑ The CoreBridge team will perform any necessary procedures (test data removal or imports) during the nightly maintenance window, and the Support Team will notify you when your system is ready.
- ❑ For a more in-depth explanation of the Go Live process, review [this article](#).