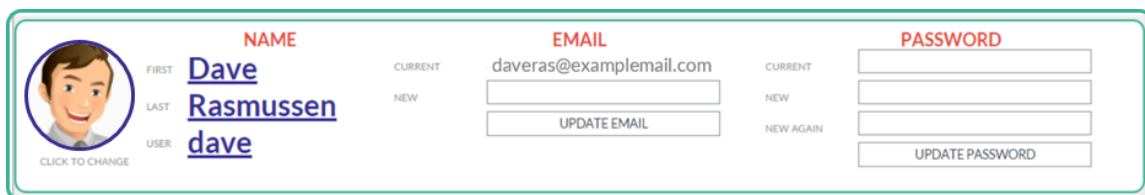# TACTICK
Getting Started Checklist

Use this checklist as a guide to getting your organization up and running in Tactick®
and your first Organized Routine™ built out ASAP.
Print this list out and check off each of the steps as you complete them.

1] Choose Your Profile Settings

❏ **Sign in to your account** at app.tactick.com and go to the Settings screen – it's the rightmost option on the top menu bar. If you haven't signed up yet, go to app.tactick.com/signup and follow the simple steps to get your account.

❏ **Fill in your First and Last Name.** You already entered your First Name when you signed up for your account, so you'll just need to add your Last Name.

❏ **Customize your Username.** We made a default username for you, but you can change it to whatever you'd like – as long as it isn't already being used by another Tactick® account.

❏ **Upload your Profile Picture.** We made a default profile picture for you – based on the first letter of the First Name you entered when you signed up – but you can upload any picture you'd like. Click on your purple profile picture and upload your own profile picture.

❏ **Change your Password.** We gave you a random password, but you can change your password whenever you want to. Enter the password we gave you, then enter and confirm your new password and hit the 'Update Password' button.

2] Know How Tactick® Is Organized

Go to the Routines screen. It's the second option from the left on the top menu bar.

There are 4 levels of organization in Tactick®: Organizations, Areas, Organized Routines™, and Tasks. All Tasks are recurring and live in Organized Routines, all Organized Routines live in Areas, and all Areas in live Organizations.

Here's a quick example: In a business Organization, the recurring Tasks you do to keep your social media running (like 'brainstorm ideas for posts') would all live in a Routine (let's call it 'Social Media'), and this routine would live in an Area (let's call it 'Market'). Your Market area would live in your business Organization (let's call it 'Acme, Inc.').

3] Set Up Your Organization and Areas

❑ **Go to the Routines screen.** It's the second option from the left on the top menu bar.

Note: If you signed up for your own Tactick® account, **your first Organization was already created** as part of the signup process. If you were invited to join Tactick® by someone else, **the Organization they invited you to was already created**.

Note: The first two steps below are for creating additional Organizations in your Tactick® account. The rest of the steps are the same for customizing both new and existing Organizations.

❑ **Click the 'Switch Org' button and select 'Add New Organization'** at the bottom of the dropdown.

❑ **Enter a name for your Organization and hit the 'Add It' button.** You'll see the Organization name you chose appear next to the 'Switch Org' button.

❑ **Edit your Organization name (optional).** When using Tactick on a computer, you can change your Organization name by selecting the Manage Team button, then clicking on the name. Change the name to whatever you want (up to 20 characters) and then hit Enter to save the new name.

❑ **Add your Areas.** Click the 'Add New Area' button on the Area banner. Enter a name for the Area and hit the 'Add It' button. Keep in mind that Area names can be a maximum of 15 characters long. Common Areas for business Organizations are:

- People
- Money
- Market
- Product
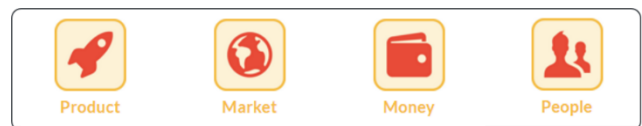
Note: These common Areas match the 4 categories in the Organized Routine Library (see the next section for more info about this). You can edit the Name and Goal for each Area, upload a Picture for each Area, and add (or remove) Areas as needed.

4] Create Your First Organized Routine

There are 2 ways to make an Organized Routine: you can add and customize one from the Organized Routine Library or you can make one yourself from scratch.

Add an Organized Routine from the Organized Routine Library

❑ **Go to the Library screen.** It's the leftmost option on the top menu bar.

❑ **Review the Sections in the Library.** There are 4 categories in the Library – these correspond with the 4 common Areas in business Organizations: People, Money, Market, and Product.

❑ **Click on an Organized Routine** to view its daily, weekly, monthly, and yearly tasks.

❑ **Choose an Organized Routine** you like, hit the 'Add It' button, and pick which one of the Areas in your Organization you want to add the Routine to.
**Note:** To add Routines to someone else's Organization, you need to have the proper permissions.

❑ **Go to the Routines screen** and customize the Routine's Name, Goal, Tasks, and Frequencies – see the next section for step-by-step instructions on how to do this.

Make an Organized Routine from scratch on your own

❑ **Go to the Routines screen.** It's the second option from the left on the top menu bar.

❑ **Select the Area** of your Organization you want to make your new Organized Routine in (or, if you added an Organized Routine from the Library, select the Area you added that Routine to).

❑ **Click on the 'Add New Routine' button.** You'll see a Routine appear called *Enter Routine Name*.

❑ **Click on the *Enter Routine Name*** tile to see the details for the new Routine.

❑ **Enter a Name and Goal** for the Routine.

❑ **Enter a Task Name** for the first Task – its default name is *Enter Task Name*.

❑ **Open the Frequency Popup** for the Task by selecting either the words 'NOT SET' in the WHEN column or [click to set] in the DETAILS column.

❑ **Pick a Start Date** – the default is today's date.

❑ **Pick an End Date** (if applicable) – the default is 'never'.

❑ **Pick a Frequency** – the default is DAILY.

❑ **View the Summary** – you can make exceptions and additions to the Task Frequency if needed.

❑ **Hit the 'Save and Close' button** to close the popup.

❑ **Here comes the fun part ... Assign the Task to someone else!** by clicking on your Profile Picture next to the Task and hitting the 'Add New Person' button. All you need is the person's First Name and Email Address (or Tactick® Username) – we'll take care of the rest!

❑ **Add and Customize as many Tasks as needed** (up to 25) to complete your Organized Routine.
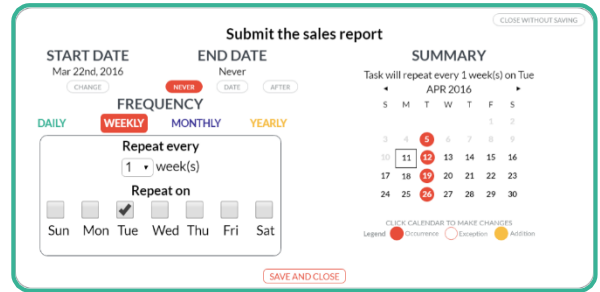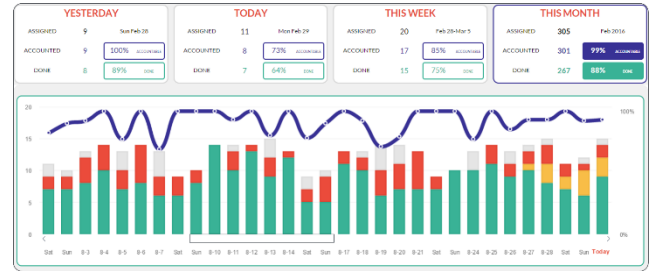

5] Check Off Your First Task

❑ **Go to the Tasks screen.** It's the middle option on the top menu bar.

❑ **Select the Area you created your first Organized Routine in** on the Area banner. Note: Tactick® remembers which Area you were viewing on the Routines screen and has it selected.

❑ **Select your Name** on the People banner.

❑ **Review your Tasks due today** and notice that each Task tile has the Task Name, Owner, Notes, Estimated Duration, Frequency, and Routine Name on it. Each tile also has an emoticon and the percent of times that Task has been marked as *Done* recently.

❑ **Check off a Task** in the check box next to the Task Name to mark it as *Done*. You'll see a green check appear in the check box and a green progress bar at the top of the list that says '1 Done'. You can click on the checkmark again to cycle through all the Task statuses: *Due, Done, Doing*, and *Not Doing*.

❑ **Select another date range** to see the Tasks that are due on each day. You can choose one of our default date ranges – Today, Tomorrow, Yesterday, Last 7 Days, This Month (to date) – or choose your own.

❑ **Select one of the Members** you added to your Organization to view their Task list for that date range.
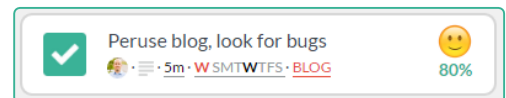
6] View Your Progress

- ❏ **Go to the Progress screen.** It's the second option from the right on the top menu bar.
- ❏ **Select the Area you created your first Organized Routine in** on the Area banner. Note: Tactick® remembers which Area you were viewing on the Tasks or Routines screens and has it selected.
- ❏ **Select your Name** from the People banner. Note: Tactick® remembers which Person you were viewing on the Tasks screen and has it selected.
- ❏ **View your Progress Report** for Yesterday, Today, This Week, and This Month.
- ❏ **View the Progress Chart** below the Progress Report you selected. Click and drag the bar at the bottom of the chart to go back one time period and forward one time period. For example, on the chart for 'This Week' you'll see this week and can click and drag to view last week and next week.

This screenshot is from an established Tactick™ account. Your charts will be all gray at first – get routinizing and start seeing your progress in real-time!

- ❏ **Click on the Today column** on the Progress Chart to see the Task List detail for today – or for whichever day's column you click on – on the Tasks screen.

7] Get Amazing Support From Our Team

- ❏ **Attend a Live Onboarding Webinar** for new customers. Sign up at **tactick.com/launchpad-webinar**
- ❏ **Watch our Onboarding Videos** for a tour of each screen. Learn more at **tactick.com/onboarding-videos**
- ❏ **Visit our Help Center** at **support.tactick.com**. Each of the 3 main sections each have several helpful articles about:
  - Using Tactick
  - Managing your Org
  - Getting Started

Welcome to the Tactick Help Center!
How can we help you today?

Using Tactick   Managing your Org   Getting Started
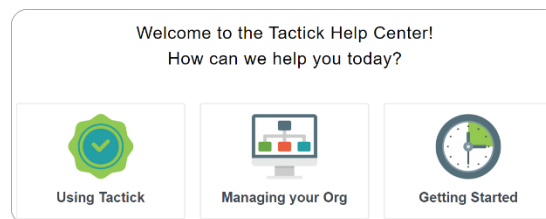
- ❏ **Chat with us** by clicking the green help button on the bottom right of your screen
- ❏ **Click the 'Get Help' button** on the T-logo menu (on desktop) or at the top of the Settings screen (on mobile) and you'll see a list of resources you can use.
- ❏ **Email us** directly at **team@tactick.com**

Congratulations!

You've completed the Tactick® Getting Started Checklist!

Can't get enough of Organized Routines?

Go to **tactick.com/routinized** to get a free copy of the Intro and Chapter One from our new book

Routinized:
How the Organized Routine™ Routinizes the Work That Elevates Success in Your Business, Family, and Personal Life