

Getting Started Checklist

A practical order to bring your business live on IXL CORE. Tick each step as you go.

1. Set up your organisation

- Create your entities, branches and departments
- Add positions and your org structure
- Add users and assign roles (scope to entity/branch)
- Set your company profile, logo and branding

2. Lay the accounting foundation

- Install a tax pack (KE/ZA) or add your tax codes
- Set up or import your chart of accounts
- Add bank accounts and enter opening balances

3. Bring in your master data

- Import customers and suppliers
- Import products, services and units of measure
- Import opening stock for each warehouse

4. Set up your people

- Import employees (staff records)
- Configure the payroll calendar, components and policy
- Set each employee's payroll profile
- Set up leave types and balances

5. Configure your ways of working

- Create document templates (branded letterhead)
- Set up rate cards for billable work
- Define approval rules where you need maker-checker

6. Go live

- Invite your team and walk them through their module
- Raise your first quote, invoice, PO or pay run
- Top up AI/SMS credits and set budget caps