

Set up your organisation once. Every project starts from it.



THE FULL CHECKLISTS

teralo.co/help
Setting up Teralo

☐ TO TICK OFF ☒ A DECISION FOR YOU

PART 1 · ONCE

Host organisation

Before your first project, led by your administrators. Most steps are in Organisation Settings. The setup pill in the sidebar tracks 13 items, and Create with Defaults starts you with 8 done.

1 Create

SWITCHER > CREATE ORGANISATION

- ☐ Agreement code from your signed Order Form
- ☐ Base currency: it can't change later
- ☐ Create with Defaults: templates and workflows

2 Details and billing

SETTINGS · BILLING

- ☐ Business Number and Discipline
- ☐ Office address, logo and cover photo
- ☐ Insurances, licences and certifications
- ☐ Billing email, address and tax ID

3 Permission templates

PERMISSIONS

- ☐ Check the templates, and add your own
A template decides which tools a person sees
- ☐ Choose who can use AI Chat

4 Your people

ORGANISATION MANAGEMENT > DIRECTORY

- ☐ Add each member with a template
- ☐ Administrators: full access to your projects
- ☐ Review requests to join

5 Tool settings

TOOLS

- ☐ Mail, Documents, Contracts, Budget Codes and Procurement
- ☐ Inspections, permits, incidents and observations
- ☐ Inductions, equipment and meetings

6 Workflows

EACH TOOL'S WORKFLOWS TAB

- ☐ Each tool's workflow, or your own
- ☐ Every step can find an approver
- ☐ Optional: lock one so projects can't swap it

7 Accounting and portal

TOOLS > CONTRACTS > ACCOUNTING

- ☐ Optional: connect Xero or QuickBooks
- ☐ Check your public portal

HAVE READY

- ☐ Signed Order Form
- ☐ Business Number
- ☐ Office address
- ☐ Logo and cover photo
- ☐ Insurances, licences
- ☐ Billing details
- ☐ Staff list and roles
- ☐ Who approves what

----- ORGANISATION READY · THEN, FOR EACH PROJECT YOU HOST -----

PART 2 · FOR EACH PROJECT

Host project

Whoever creates a project becomes its administrator. Most steps are in Project Settings. The setup pill tracks 12 items, and Activate All Templates ticks off its five tool items from your organisation's setup.

1 Create

SWITCHER > ADD PROJECT

- ☐ Project name and anticipated value
- ☐ Activate All Templates, to start from your organisation's setup

2 Project details

SETTINGS

- ☐ Project code, value and dates
- ☐ Project manager
- ☐ Site address and time zone
- ☐ Logo and cover photo
- ☐ Project administrators

3 Tools and locations

TOOLS · LOCATIONS

- ☐ Activate the entries this job uses
- ☐ Location tree: by hand, from drawings or Excel
- ☐ Inspections, site diary, inductions and bookings

4 Workflows

EACH TOOL'S WORKFLOWS TAB

- ☐ Organisation default or the project's own
- ☐ Name each workflow's reviewers
- ☐ Approvers hold the approval permission

5 Permissions and compliance

PERMISSIONS · SETTINGS

- ☐ Each company's template, such as Subcontractor Manager
- ☐ Compliance each company must provide

6 People

DIRECTORY

- ☐ Add your team from the Global Directory
- ☐ Add the subbies and consultants
Guests pay nothing to take part
- ☐ Distribution groups for Mail and Meetings

7 Portal

TOOLS > PUBLIC SITE

- ☐ Documents, minimum PPE, contacts
- ☐ Share the portal's address

HAVE READY

- ☐ Project code, value
- ☐ Start and end dates
- ☐ Site address
- ☐ Logo and cover photo
- ☐ Current drawings
- ☐ Required compliance
- ☐ Your project team
- ☐ Subbie contacts