

New User Training Checklist

(Updated 05/16/2018)

New to IMS? We've compiled a list of helpful skills to quickly become an expert!

101: Beginner

CRM:

- a. How to [Add](#) and [Edit](#) a Contact
- b. [How to Sign in as an Investor](#)
- c. [Edit Investor Profile Connections](#)
- d. [How to Send Invitations to Investors](#)
- e. [BCC Functionality](#)

Document Management:

- a. [How to Upload Investor Documents](#)
- b. [How to Upload an Asset/Class Level Document](#)

201: Intermediate

Project Build:

- a. [Creating a New Project](#)
- b. [New Offering Checklist](#)
- c. [Adding an Investment and Invite to Invest](#)

Misc:

- a. [Add a New Loan](#)
- d. [Adding Images to Project](#)
- e. [Exporting Entity Information](#)

301: Expert

- a. [Adding and Exporting Distributions](#)
- b. [Waterfall Rule Creation](#)
[Waterfall 101, Waterfall 102](#)
[Waterfall 201, Waterfall 202](#)
- c. [Running Distributions with Waterfall](#)
- d. [Investor Dashboard Preferences](#)