Starter checklist

Overview

The Starter checklist on your Dashboard lists the steps that get your workspace producing insights. The cards you see can vary by account, role, and permissions, so your checklist may not match a teammate's.

Set up your workspace

- **Describe your company** (**Admin > Company**) so Alchemer Voice understands your products, solutions, and competitors. See Company Description Setup.
- **Invite team members** (**Admin > Team**). Invitees must accept the emailed invitation; the step is done once a teammate has joined. See User Management.
- **Connect your CRM** (**Admin > Connections**) so conversations and insights link to your CRM records. See Connections / Integrations.
- **Connect to your external meeting recorders**, such as Gong, so their recordings feed into Alchemer Voice.

Bring in a conversation

Have your first conversation by uploading a recording. See Uploading a recording or transcript. The step is marked done once you have a finished meeting or call linked to a calendar event where you're an attendee, so an upload alone may not tick it.

Work with insights

The **Create topic sets**, **Ask the Analyst**, and **View topic sets** cards stay locked (**Requires insights**) until you have at least one insight. **View topic sets** shows sets your teammates generated. See Topic Sets and Analyst Tool.

Optional steps

Book a tour appears only when a booking link is available for your workspace.

Hiding the checklist

Select **Complete and hide checklist**, then confirm **Hide checklist**. The setting is per person, so hiding it doesn't hide it for your teammates.

Troubleshooting

- **Create topic sets or Ask the Analyst is locked:** Both need insights. Bring in a conversation and wait for it to finish processing.

- **Have your first conversation isn't ticked after an upload:** The step looks for a completed meeting or phone call tied to a calendar event that lists you as an attendee.

Permissions

You only see the checklist cards your role allows, and admins see the full list. If a card is missing, ask an admin. See Roles and permissions.

Card	Who sees it
Describe your company	People who can manage company settings
Invite team members	People who can manage the team
Connect your CRM, Connect to your external meeting recorders	Admins only
Have your first conversation	People allowed to upload conversations
View topic sets	Shown instead of Create topic sets to people who can view topic sets but not create them

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