

New Employee Checklist

Marketing Platform

Congratulations on your new hire! If you're unsure how to onboard them with RevenueWell, we're here to help. Below is a checklist to help you successfully add a new employee to Marketing Platform and set them up for success.

- ❑ **Add a User to Marketing Platform:** To start, add your employee as a new user in Marketing Platform. Here's how to do this:
 - Navigate to Settings
 - Find 'User Management'
 - Select 'Add a new user'
 - Follow the steps to add the user

For more details, review this [Help Center article](#). **Note:** For security reasons, each user should have unique login information. We do not recommend sharing login details across users.
- ❑ **Adjust User Permissions (Enterprise):** If you are an Enterprise user, manage user permissions across locations from the Users section of the Enterprise Admin Portal. Review this [Help Center article](#) to familiarize yourself with the meaning of permissions and how to adjust them for all users.
- ❑ **Download the Desktop App:** If your new employee is using a new computer, download the Marketing Platform Desktop App to that computer. This is necessary for using Messenger and Screen Pop. For instructions on how to do this, review this [Help Center article](#).
- ❑ **Share RevenueWell Resources:** There's lots to learn in RevenueWell, especially for first-time users. Highlight important resources to help your new employee hit the ground running, such as the Help Center and RevenueWell Academy. Here are a few resources we recommend for new Marketing Platform users:
 - [Getting Started](#)
 - [Daily Operations with RevenueWell](#)
 - [Marketing Platform Courses](#)

If you have questions or concerns about these new employee steps, please contact the Customer Support Team at support@revenuewell.com or 847-597-1745.