RevenueWell

New Employee Checklist

Phones

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 RevenueWell Phones and set them up for success

- ☐ **Add a User to Phones:** New employees need to be added to the PBX to make and receive calls through Phones. To add your new employee, contact Customer Support by emailing support@revenuewell.com and request to add a new PBX user. Make sure to include:
    - User's name
    - User's email address
    - Permission level (Admin or User)

- ☐ **Prepare Phone Details:** Once Customer Support has added the new employee to the PBX, provide Customer Support with the correct user settings for phone numbers, devices, extensions, and user features. They will edit the User details in your PBX to ensure your new employee is set up for success. **Note:** Do not edit these details without the help of our trained Support team. Making independent edits could jeopardize the usability of your phones and devices.

- ☐ **Download the Desktop App:** If your new employee is using a new computer, download the Marketing Platform Desktop App. This is necessary for using the Screen Pop feature. 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. Bookmark 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 Phone users:
    - RevenueWell Phone User Guide
    - Holiday Phone Settings
    - Phone 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.