



Customer Onboarding Checklist

Your Onboarding Checklist

Please note: If you are having data converted, please refrain from adding employees and editing drop-down lists until the conversion is complete. Failing to do so could incur additional project time and charges for data clean-up.

Steps to Success! - Action Items	Additional Details	Quick Reference Video Link	Quick Reference Documentation	Need for MS to help?	Date completed
TRACK YOUR PROGRESS. ENTER THE DATE COMPLETED AS YOU FINISH EACH THEM					
Login & Bookmark the Login Page. Save your Login Credentials someplace safe and easy to access.	Supported browsers include Chrome, Firefox, Edge, and Safari	How to Login and Bookmark	Supported Browsers	<input type="checkbox"/>	Do it TODAY!
Upload Company Logo	This logo will appear on Email Templates	How to Upload a Logo	Upload Your Company Logo	<input type="checkbox"/>	Enter Date Completed
Setup General Information – Company Address Phone Website	This contact info will appear on Email Templates and can be used in print files	How to Configure General Setup	General Setup	<input type="checkbox"/>	Enter Date Completed
Company Setup – Create Primary and Secondary Lead Sources / Inactivate past sources	If converting Data, wait until Data is loaded before adding Sources	How to Setup Primary and Secondary Lead Sources	Editable Drop Down Lists	<input type="checkbox"/>	Enter Date Completed



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Company Setup – Enter Products, Descriptions, & Product Attributes	Have these ready to go from the start to streamline data entry	How to Configure Products and Descriptions	Editable Drop Down Lists	<input type="checkbox"/>	Enter Date Completed
Setup Business Hours and Default Appointment Length	Can also enable Google Calendar Integration if applicable	How to Configure the Calendar	Enabling Google Calendar to Integrate with MarketSharp Calendar	<input type="checkbox"/>	Enter Date Completed
Employee Setup – Add Employees and assign Employee Types	If converting Data, wait until Data Conversion is completed before adding Staff	How to Add Employees	Enter An Employee	<input type="checkbox"/>	Enter Date Completed
Lead Capture Setup	Having leads come directly into MarketSharp allows you to jumpstart marketing efforts	How to Setup Lead Capture	Lead Capture Setup Using HomeAdvisor as Example	<input type="checkbox"/>	Enter Date Completed
Setup Quickbooks Integration	Online or Desktop	How to Setup Quickbooks Desktop How to Setup Quickbooks Online	Desktop: Quickbooks Desktop Setup Online: Quickbooks Online Setup	<input type="checkbox"/>	Enter Date Completed
Download and Install Outlook Addin	If applicable (not using MarketSharp Auto Email) Not compatible with Macs	How to Install Outlook Addin	Install Outlook Add-in	<input type="checkbox"/>	Enter Date Completed



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Add Meta4 Clickonce Launcher to Browser and Install Print File Manager	This enables you to edit and create print files throughout MarketSharp	How to Add Extension for Print Files	How to Add Extension for Print Files	<input type="checkbox"/>	Enter Date Completed
Configure Goals and Performance Standards	Allows you to accurately see how your sales team is doing via the Dashboard	How to Setup the Dashboard	Dashboard Overview	<input type="checkbox"/>	Enter Date Completed
Enable Auto Email	Check the box that says Enabled in Admin -> MarketSharp Email Setup	How to Enable Auto Email	Enabling Auto Email	<input type="checkbox"/>	Enter Date Completed
Setup Text Message Account	Company name is typically account name. Pick a phone number and choose who should receive responses via email forwarding	How to Setup Text Messaging	MarketSharp Texting	<input type="checkbox"/>	Enter Date Completed

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