AVERITT CONNECT

CUSTOMER ON-BOARDING CHECKLIST

Purpose of document: performing the tasks below will ensure a successful onboarding and help to get the customer shipping immediately with confidence

Invite the Customer
- Send customer registration invitation via email
- Set a preliminary password for the customer
- Confirm the custoemr recieved the email invitation

Assist the Customer with Account Profile
- Add the company's logo
- Create a primary shipping location with hours or operation
- Add other carriers the customer works with

Explain the *Shipping* Calendar
- Highlight the color coded shipment status

Walkthrough the *Product* Catalog
- Add 1 to 2 products for the customer
- Explain the value of this feature in relation to time and accuracy
- Check and insure Density calculator is enabled

Demonstrate the *Rating* Functionality
- Enter shipment details
- Highlight Google Maps integration
- Run a rate quote from start to finish

Explain the *Quote History* Page
- Historic Record of all shipment quotes
- Ability to pickup right where you left off

Explain the *Shipments* Page

Provide an Overview of the Available Options under *Customer Settings*

Demonstrate how to *Schedule a Demo* Directly with the CSA

Demonstrate how to *Submit a Support Ticket*