



# Getting Started Checklist

- Review how to navigate the platform, including using the navigation menu, dashboard, and persistent buttons.
- Review options for help and support available using the Help Center menu, including quick hit videos.
- Verify that your profile settings are correct.
- Connect your accounts with integrated services (social media, BombBomb).
- Add yourself as a contact.
- Verify that your contacts have been imported and all information is correct.
- Familiarize yourself with views in Focused View created by your organization.
- Create Contact Lists when you need to organize individual contacts together.
- Familiarize yourself with email templates available.
- Familiarize yourself with journeys available.
- Invite at least one real estate agent or financial professional to be your co-marketing partner.

## Notes

Click or tap here to enter text.