

Agent Setup Checklist

Step 1 - Connect Your Mailbox to Kizen/Compass

Integrate your Gmail inbox

1. Select your initials or photo, in the top right-hand corner of the top menu bar
2. Select **My Profile**
3. In the Email Integrations section, select **Add Integrated Email**
4. Choose Gmail as Provider
5. Click Sign-in with Google
6. Click on your Email
7. Click Allow

Integrate your Outlook inbox

1. Follow above steps 1-3, choosing Outlook as Provider
2. Follow the prompts provided by Outlook to connect to your account. Grant permissions to the Kizen application
3. Once connected, the email address will show up in the **Email Integrations** section

Add Email Signature

1. Click on **profile picture** or **initials** in the top right corner
2. Go to **My Profile**
3. Navigate to the **Email Signature** section and type in the signature text
4. Click **Save**

Once connected, the email address will show in the Integrated Inboxes section

Step 2 - Architect Your Data

1. [Add Contacts](#)
2. [Create Contact Groups](#)
3. [Contacts Group Filter](#)
4. [Contact Filters By Interactions and By Messages](#)
5. [Custom Objects Overview](#)
6. [Add Custom Field](#)

Step 3 - Streamline Your Workflow with Automations

1. [Create an Automation](#)
2. [Review and Setup Automations](#)
3. [Build a Form](#)
4. [Activities overview](#)
5. [Add Activity](#)

Step 4 - Reaching out to your contacts

1. [Draft personalized emails or messages](#)
2. [Send outreach emails](#)
3. [Schedule Emails From Broadcast Calendar](#)
4. [Schedule Automations From Broadcast Calendar](#)

Step 5 - Additional Integrations

1. [Connect RingCentral](#)

Step 6 - Utilize Data Insights

1. [Customize Homepage / Toolbar](#)
2. [Build Dashboards](#)
3. [Creating and Customizing Dashlets](#)

Step 7 - Need assistance?

1. [Onboarding Packages and Services](#)
2. [Contact Support](#)