Front.com

Finance Teams Front Setup Checklist

Welcome to Front, the customer communication hub for finance teams. With Front, your team can work together to process requests faster, reduce missed emails, and accelerate cash collections.

Use this checklist to set up Front for your finance team. Got a question? We've got answers. Reach out at onboarding@front.com.

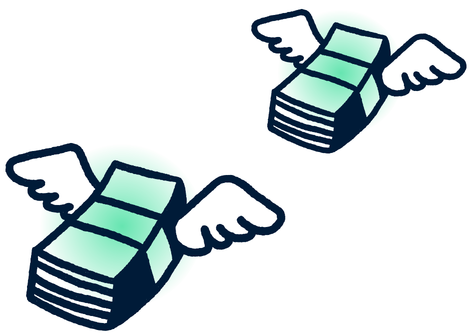
STEP 1:

Add your Structural Elements

- [ ] Add your shared inboxes to Front - such as your ar@, payroll@, accounts-receivable@, or taxes@ inboxes
- [ ] Import your contacts
  - Use the provided CSV template to quickly upload your contacts.
  - Tip: Use the Contact Details plugin to see a full timeline of communication with each customer. You can see calls, texts, emails, and more.
- [ ] Import your account information
  - Use the provided CSV template to upload all of the companies or organizations your team works with.
- [ ] Enable your favorite apps and tools
  - Integrate Shopify, Pagato, or Chargedesk to easily manage all of your work from one centralized hub.

STEP 2:
Build your Finance Team Workflow

- ☐ Determine your message triaging with assignments and routing
  - Tip: Assign conversations to the person responsible for handling based on the type of request, such as vendor questions or expenses.
- ☐ Create tags to track topics like “refund,” “invoice,” or “paid” to easily track all of your team’s requests
- ☐ Build message templates to allow your team to quickly reply to common questions or easily compose collections messages
- ☐ Automate your processes through rules
  - Example: Use the rules library to auto-tag all conversations that contain keywords like “invoice” or “receipts.”
  - Example: Use the rules library to assign based on sender so you can route the right vendors to the right accountants.



STEP 3:
Invite and Train your team

- ☐ Have your team attend a live Front Training Session
- ☐ Build signatures for your team
- ☐ Invite your team