

# Individual Setup Checklist



Welcome to Front! Use this checklist to set up Front, so you can start delivering extraordinary experiences to every customer.

## STEP 1: Set up your Profile

- Accept your invite and add your user information
- Add your individual inbox to Front
- Add a profile picture
- Download Front on your desktop and/or mobile device

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## STEP 2: Familiarize Yourself with your Team Workspace

- Register for a live Teach Me How to Front Training
- Find your organization's Front Admin
- Click through your team inboxes
- Review your team's Front workflow and best practices documentation
  - Tip: Ask your Front administrator and teammates if you have a documented process for Front workflows.
- Learn how to set yourself Out of Office



### STEP 3:

## Personalize your Workspace and Preferences

- Create notifications so you're notified when and where you get new messages
- Understand the four sections of your Front Inbox and when, why, and how messages can be found in each section
- Review and update your preferences as needed
  - Tip: Set your default send as "Send and Archive."
  - Tip: Try changing the color of your Front theme.

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### STEP 4:

## Review Front Help Resources

- Go to Front Classroom for additional onboarding resources
- Review Front's Help Center
- Optional: Email [support@front.com](mailto:support@front.com) if you have any questions

