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Total Rewards: Setup Checklist

Customer Onboarding Process

01
Data Collection

02
Data Validation

03
Go Live

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Step-By-Step Product Setup

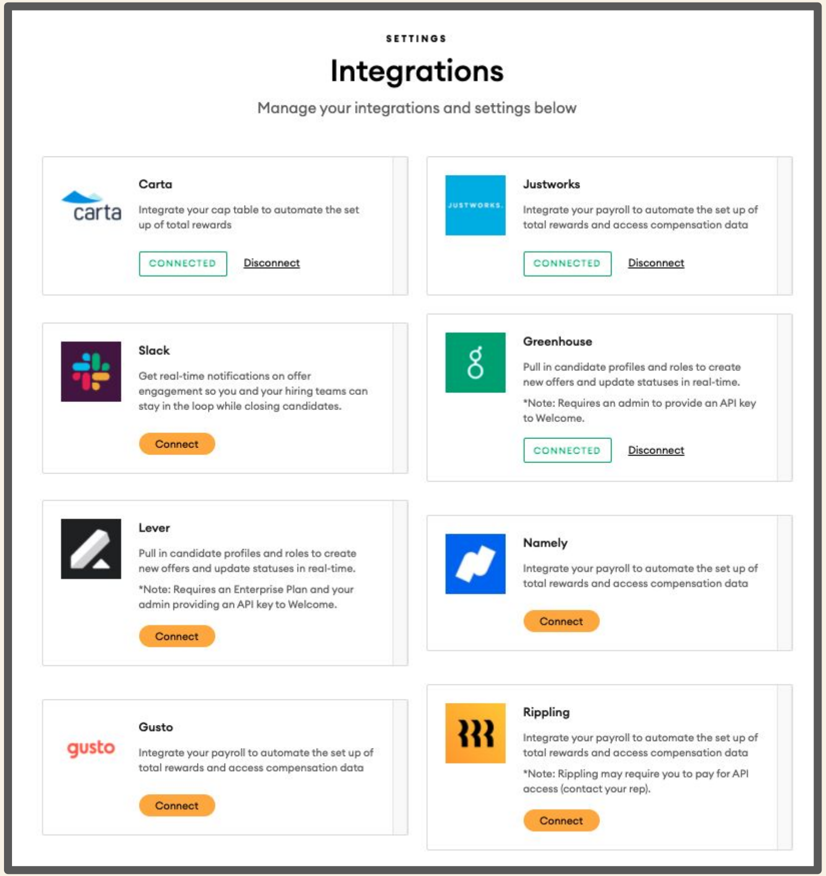
The following steps in will ensure you are ready to share Total Rewards profiles with your employees. We recommend capturing any edits or revisions as you go. Once complete, you can send your revisions to support@heywelcome.com.

Step 1: Connect payroll provider and cap table

- Connect your Payroll Provider
- Connect your Cap Table

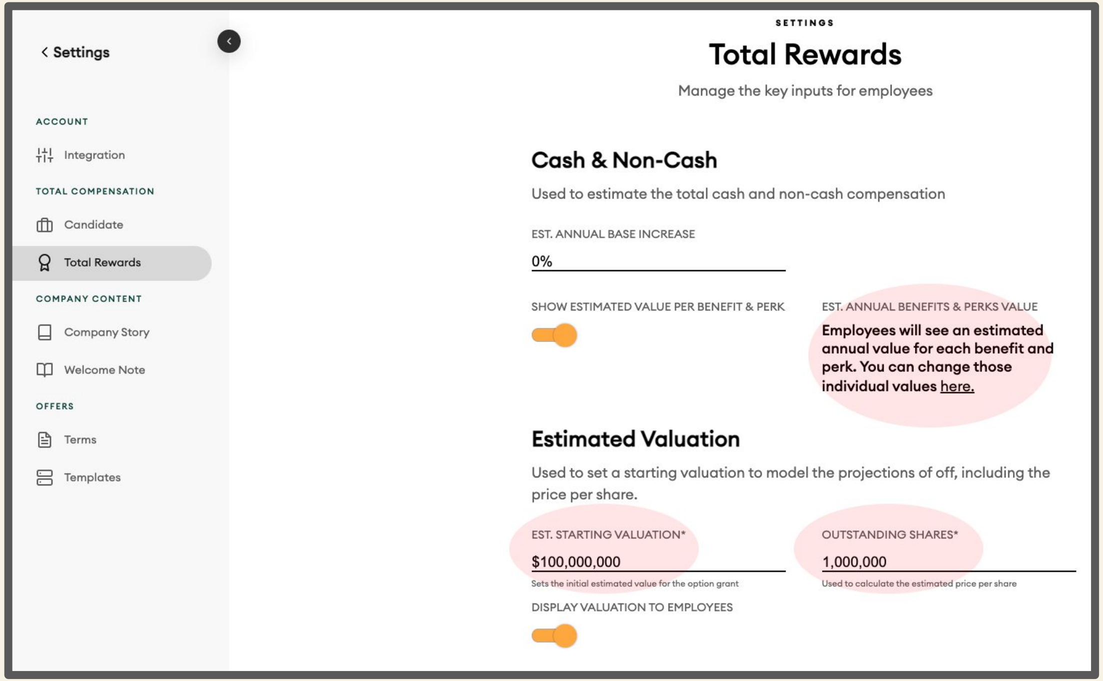
If you have not already integrated your payroll provider and cap table please do so by:

1. *Log into Welcome*
2. *Navigating to Settings (gear icon, bottom left)*
3. *Integrations > Manage*
4. *Click "Connect" and follow the instructions*



Step 2 : Validate Company Information

- Confirm Company Valuation and Outstanding Shares are up-to-date
- Assign line-item values to Benefits and Perks

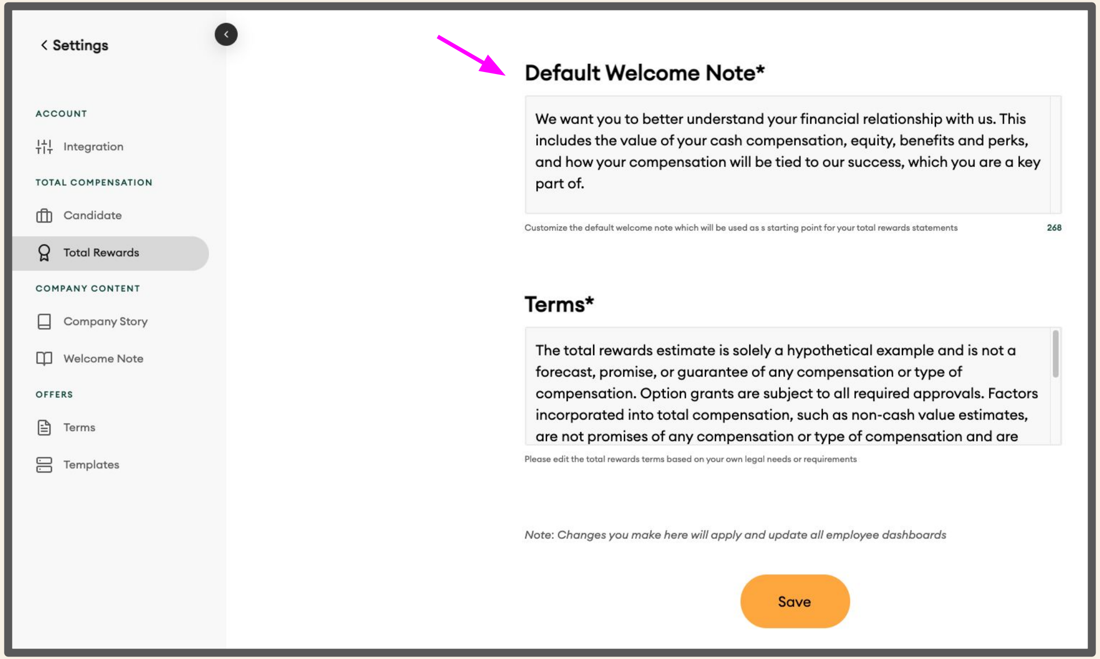


You can update company information with the following instructions:

1. *Log into Welcome*
2. *Navigating to Settings (gear icon, bottom left)*
3. *Total Rewards > Employee*

Step 3 : Review Welcome Note

We’ve added placeholder copy for you, but please feel free to update the language with something more specific to your company!

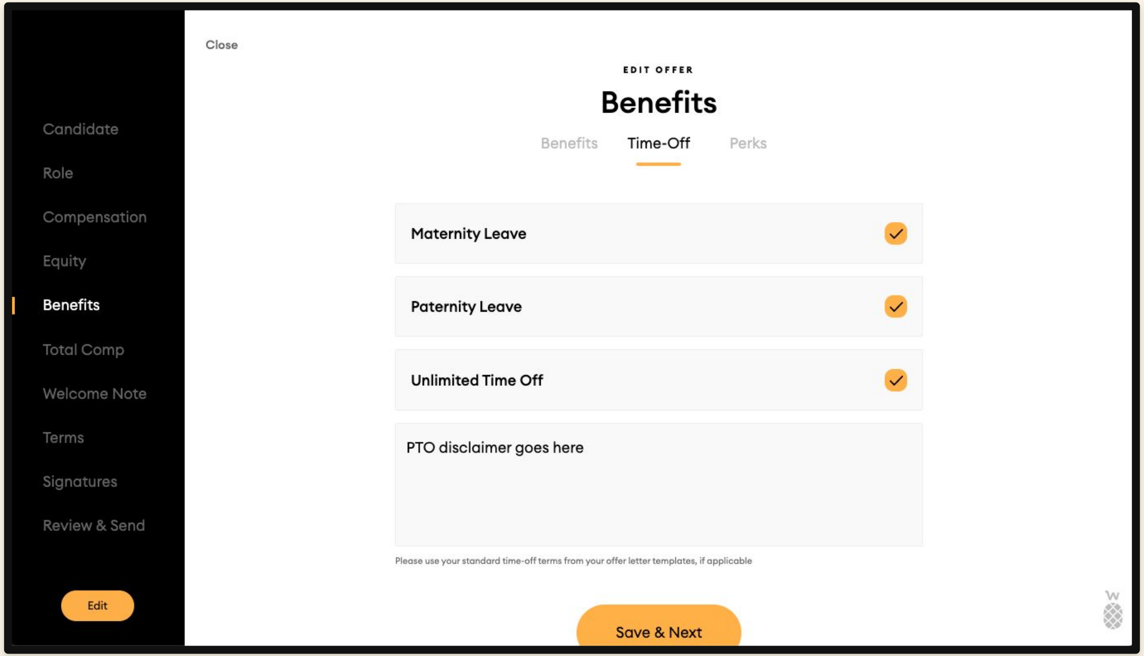


To update the Welcome Note please follow these instructions:

1. *Log into Welcome*
2. *Navigating to Settings (gear icon, bottom left)*
3. *Total Rewards > Employee*

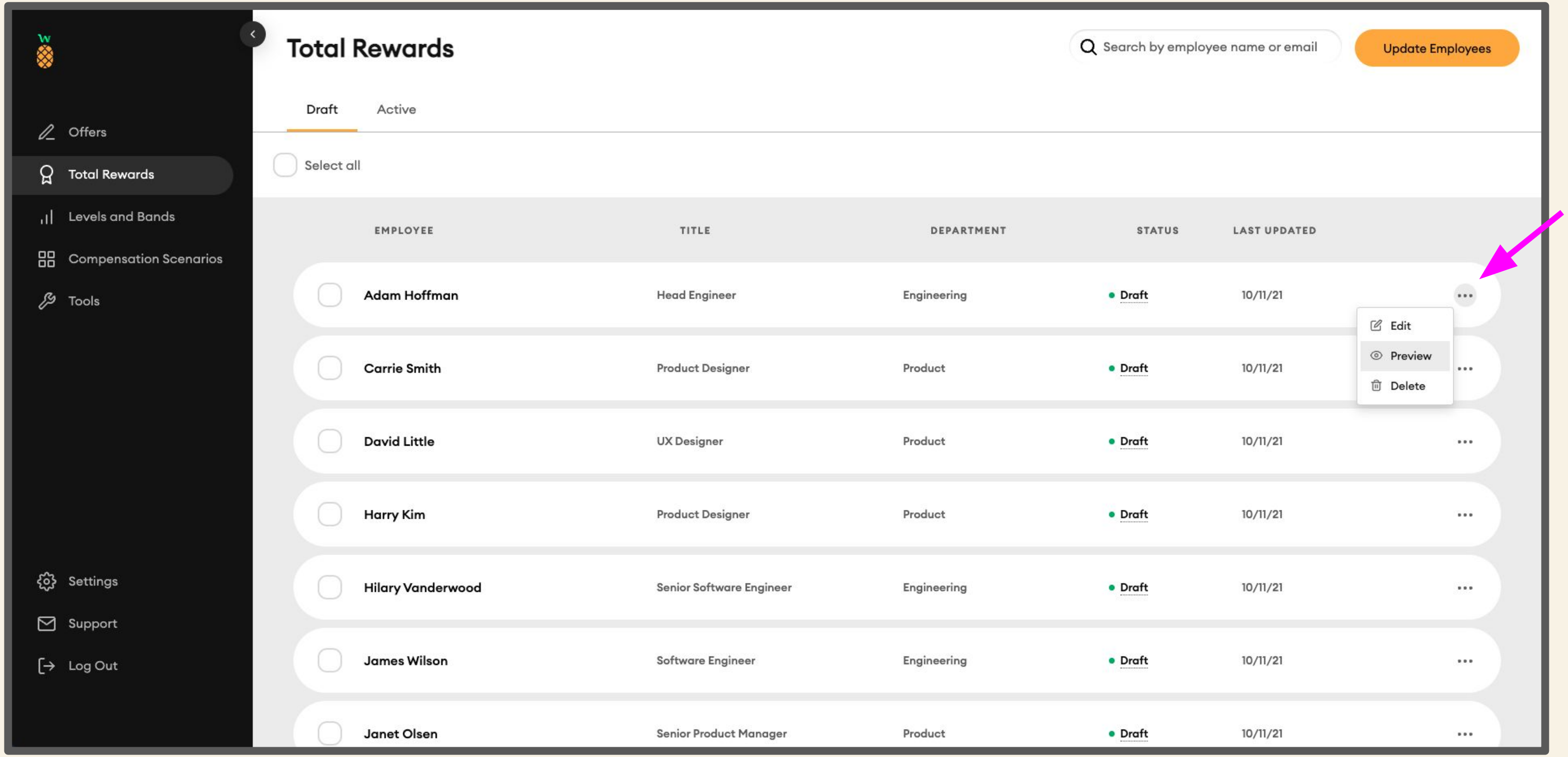
Step 4 : Review Benefits, Time-Off, Perks

Review the Benefits, Time-Off, and Perks information and make sure it reflects accurately for each employee

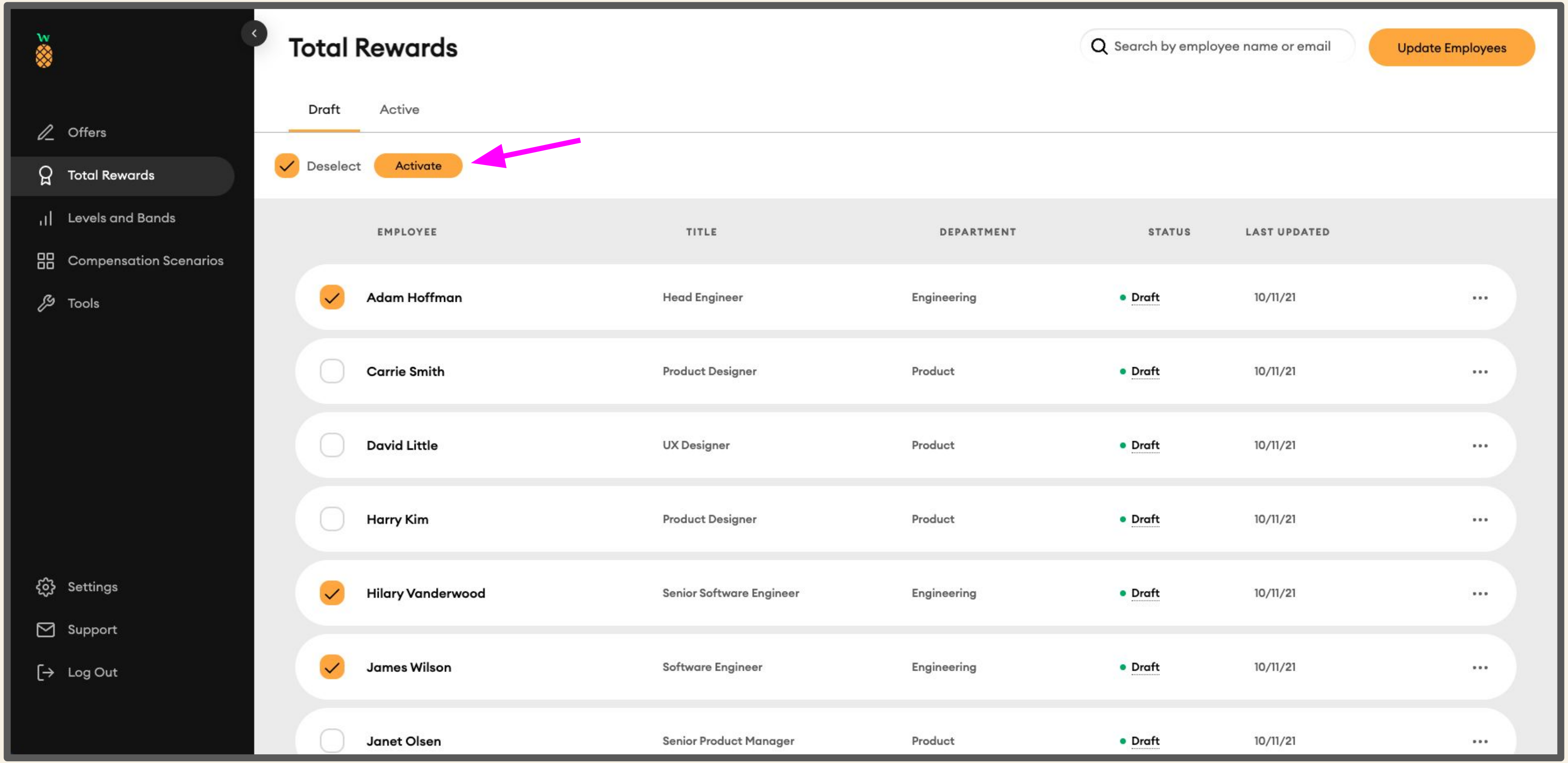


Step 4 : Preview Employee Profile

We recommend rolling out Total Rewards to your employees by department or team to ensure a smooth transition.
Prior to making an employee's Total Rewards profile active, we suggest you preview the profile to double check the information.



Begin Roll Out!



Review: User Roles

Review our roles and notifications and notify us of any necessary user updates.

Role	Access & Notifications
Super Admin	• Can access Total Rewards product
Admin	• Can access Total Rewards product
Senior Recruiter	• Does not have access to Total Rewards product
Recruiter	• Does not have access to Total Rewards product

**Only applicable if you have purchased the Total Rewards product*

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You’re all done!

Have revisions that need to be made to your company profile? Please email support@heywelcome.com and we will get them updated within 3 business days.