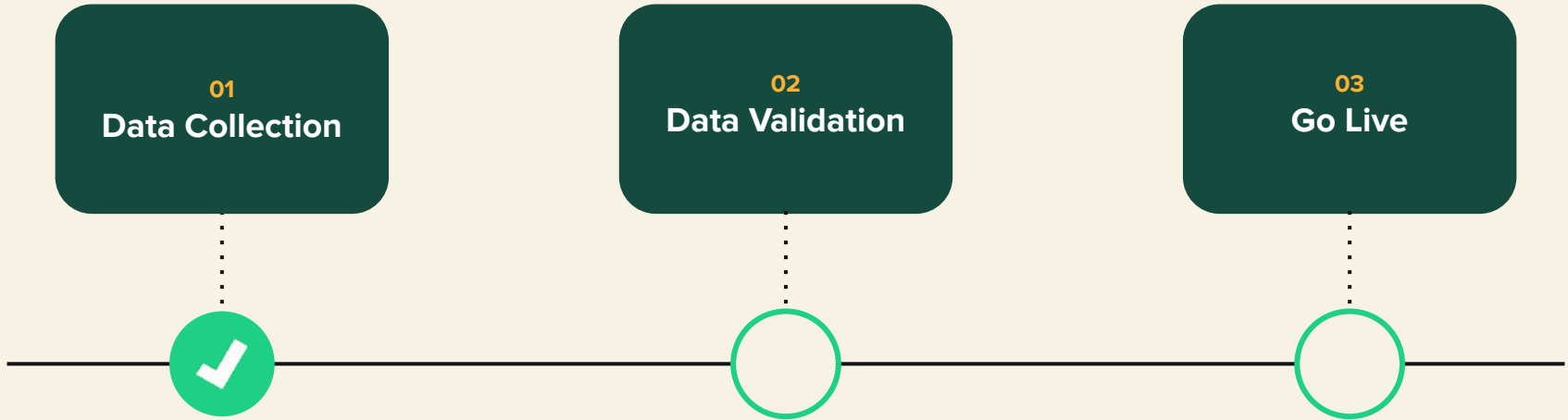




Total Rewards: Setup Checklist



Customer Onboarding Process





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*

SETTINGS

Integrations

Manage your integrations and settings below

Carta
Integrate your cap table to automate the set up of total rewards

CONNECTED [Disconnect](#)

Justworks
Integrate your payroll to automate the set up of total rewards and access compensation data

CONNECTED [Disconnect](#)

Slack
Get real-time notifications on offer engagement so you and your hiring teams can stay in the loop while closing candidates.

[Connect](#)

Greenhouse
Pull in candidate profiles and roles to create new offers and update statuses in real-time.
*Note: Requires an admin to provide an API key to Welcome.

CONNECTED [Disconnect](#)

Lever
Pull in candidate profiles and roles to create new offers and update statuses in real-time.
*Note: Requires an Enterprise Plan and your admin providing an API key to Welcome.

[Connect](#)

Namely
Integrate your payroll to automate the set up of total rewards and access compensation data

[Connect](#)

Gusto
Integrate your payroll to automate the set up of total rewards and access compensation data

[Connect](#)

Rippling
Integrate your payroll to automate the set up of total rewards and access compensation data
*Note: Rippling may require you to pay for API access (contact your rep).

[Connect](#)

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

Settings

ACCOUNT

- Integration

TOTAL COMPENSATION

- Candidate
- Total Rewards**

COMPANY CONTENT

- Company Story
- Welcome Note

OFFERS

- Terms
- Templates

SETTINGS

Total Rewards

Manage the key inputs for employees

Cash & Non-Cash

Used to estimate the total cash and non-cash compensation

EST. ANNUAL BASE INCREASE

0%

SHOW ESTIMATED VALUE PER BENEFIT & PERK

EST. ANNUAL BENEFITS & PERKS VALUE

Employees will see an estimated annual value for each benefit and perk. You can change those individual values [here](#).

Estimated Valuation

Used to set a starting valuation to model the projections of off, including the price per share.

EST. STARTING VALUATION*

\$100,000,000

OUTSTANDING SHARES*

1,000,000

Sets the initial estimated value for the option grant

Used to calculate the estimated price per share

DISPLAY VALUATION TO EMPLOYEES

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

The screenshot shows the 'Settings' page for 'Total Rewards'. The left sidebar contains a navigation menu with categories: ACCOUNT (Integration), TOTAL COMPENSATION (Candidate, Total Rewards), and COMPANY CONTENT (Company Story, Welcome Note). The 'OFFERS' section includes Terms and Templates. The main content area is titled '< Settings' and features a 'Default Welcome Note*' field with a pink arrow pointing to it. The placeholder text reads: 'We want you to better understand your financial relationship with us. This includes the value of your cash compensation, equity, benefits and perks, and how your compensation will be tied to our success, which you are a key part of.' Below this is a small note: 'Customize the default welcome note which will be used as a starting point for your total rewards statements' and the number '268'. The 'Terms*' field contains placeholder text: 'The total rewards estimate is solely a hypothetical example and is not a forecast, promise, or guarantee of any compensation or type of compensation. Option grants are subject to all required approvals. Factors incorporated into total compensation, such as non-cash value estimates, are not promises of any compensation or type of compensation and are'. Below this is another note: 'Please edit the total rewards terms based on your own legal needs or requirements'. At the bottom right, there is an orange 'Save' button and a note: 'Note: Changes you make here will apply and update all employee dashboards'.

Step 4 : Review Benefits, Time-Off, Perks



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

Close

EDIT OFFER

Benefits

Benefits **Time-Off** Perks

Maternity Leave	<input checked="" type="checkbox"/>
Paternity Leave	<input checked="" type="checkbox"/>
Unlimited Time Off	<input checked="" type="checkbox"/>
PTO disclaimer goes here	

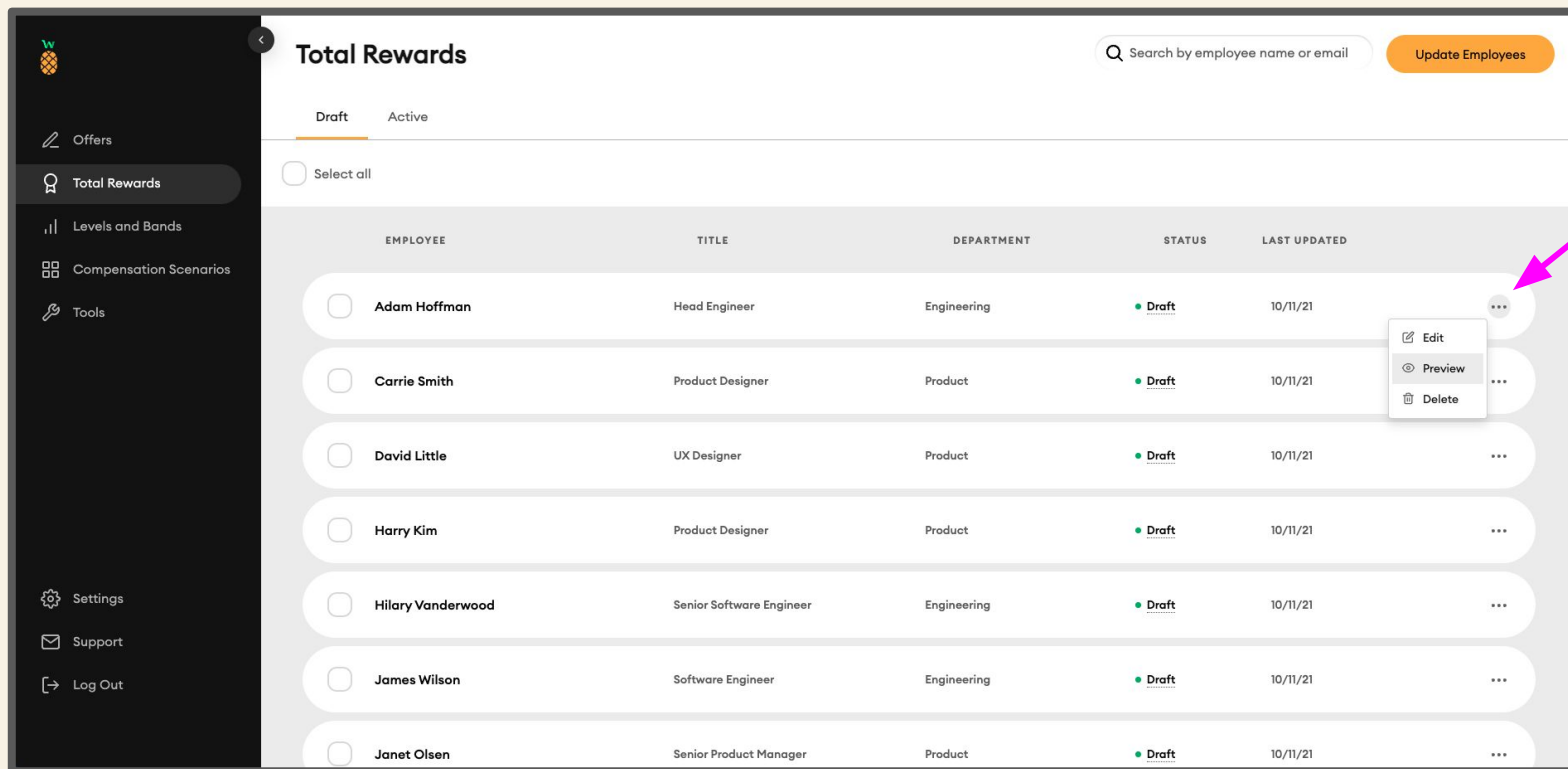
Please use your standard time-off terms from your offer letter templates, if applicable

W

W

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.



The screenshot displays the 'Total Rewards' management interface. On the left is a dark sidebar with navigation options: Offers, Total Rewards (selected), Levels and Bands, Compensation Scenarios, Tools, Settings, Support, and Log Out. The main content area is titled 'Total Rewards' and includes a search bar and an 'Update Employees' button. Below the title are tabs for 'Draft' and 'Active', with 'Draft' selected. A 'Select all' checkbox is present. The main area contains a table of employees with columns for Employee, Title, Department, Status, and Last Updated. A dropdown menu is open for the first employee, Adam Hoffman, showing 'Edit', 'Preview', and 'Delete' options. A pink arrow points to the 'Preview' option.


EMPLOYEE	TITLE	DEPARTMENT	STATUS	LAST UPDATED	
<input type="checkbox"/> Adam Hoffman	Head Engineer	Engineering	● Draft	10/11/21	⋮
<input type="checkbox"/> Carrie Smith	Product Designer	Product	● Draft	10/11/21	⋮
<input type="checkbox"/> David Little	UX Designer	Product	● Draft	10/11/21	⋮
<input type="checkbox"/> Harry Kim	Product Designer	Product	● Draft	10/11/21	⋮
<input type="checkbox"/> Hilary Vanderwood	Senior Software Engineer	Engineering	● Draft	10/11/21	⋮
<input type="checkbox"/> James Wilson	Software Engineer	Engineering	● Draft	10/11/21	⋮
<input type="checkbox"/> Janet Olsen	Senior Product Manager	Product	● Draft	10/11/21	⋮

Begin Roll Out!

The screenshot displays a web application interface for managing 'Total Rewards'. On the left is a dark sidebar with navigation options: Offers, Total Rewards (selected), Levels and Bands, Compensation Scenarios, Tools, Settings, Support, and Log Out. The main content area is titled 'Total Rewards' and includes a search bar and an 'Update Employees' button. Below the title are tabs for 'Draft' and 'Active'. A control bar shows a checked 'Deselect' button and an 'Activate' button, with a pink arrow pointing to the latter. The main area contains a table of employees with their details and offer status.

EMPLOYEE	TITLE	DEPARTMENT	STATUS	LAST UPDATED	
<input checked="" type="checkbox"/> Adam Hoffman	Head Engineer	Engineering	● Draft	10/11/21	...
<input type="checkbox"/> Carrie Smith	Product Designer	Product	● Draft	10/11/21	...
<input type="checkbox"/> David Little	UX Designer	Product	● Draft	10/11/21	...
<input type="checkbox"/> Harry Kim	Product Designer	Product	● Draft	10/11/21	...
<input checked="" type="checkbox"/> Hilary Vanderwood	Senior Software Engineer	Engineering	● Draft	10/11/21	...
<input checked="" type="checkbox"/> James Wilson	Software Engineer	Engineering	● Draft	10/11/21	...
<input type="checkbox"/> Janet Olsen	Senior Product Manager	Product	● Draft	10/11/21	...

Review: User Roles

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

Role	Access & Notifications
Super Admin	<ul style="list-style-type: none"><li data-bbox="537 369 1174 405">• Can access Total Rewards product
Admin	<ul style="list-style-type: none"><li data-bbox="537 496 1174 532">• Can access Total Rewards product
Senior Recruiter	<ul style="list-style-type: none"><li data-bbox="537 624 1387 660">• Does not have access to Total Rewards product
Recruiter	<ul style="list-style-type: none"><li data-bbox="537 752 1387 788">• Does not have access to Total Rewards product



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.