

New customer checklist

Go from your invite email to your first logged package, in order.

Work through these steps in the [customer dashboard](#), then hand over to your front-desk staff on the iPad. Each step links to the full guide.

Set up your account

- 1 **Accept your invite and choose a plan.** Open the invite email, pick a plan, create your account, and finish checkout. See [Get started on the dashboard](#).
- 2 **Create your first location.** Follow the [Launch checklist](#) and click **Create first location**. See [Set up your first location](#).
- 3 (Optional) **Add your other locations.** See [Add another location](#).

Add the people you deliver to

- 4 **Add your tenants and their contacts.** Add contact email addresses so tenants get package emails. See [Add tenants and contacts](#).
- 5 (Optional) **Import tenants in bulk.** Use **Import CSV** for a long tenant list. See [Import tenants from a CSV](#).
- 6 (Optional) **Set up central delivery** for tenants with a mailroom. See [Set up central delivery](#).

Bring in your team

- 7 **Invite your front-desk staff.** For each location, invite Managers and Associates. They join on the iPad with the code. See [Invite your front desk staff](#).
 - 8 (Optional) **Add other admins.** See [Add admins and team members](#).
-

Go live

- 9 **Log your first package.** A staff member signs in on the iPad and logs a package. Share the Front desk quick start with them.
- 10 **Check it arrived.** Open **Dashboard** in the customer dashboard and look for it under **Recent package activity**. See [Read your dashboard](#).

Note: Billing, plan changes, and failed payments are covered in [Manage billing](#).

See also

- [Get started on the iPad](#)
- [Manage your account](#)