



## **Salesperson Onboarding: Next Steps**

Welcome to Syлло Solutions! We are excited to have you join our dynamic team. To ensure a smooth onboarding process and set you up for success, please follow the steps outlined below:

### **1. Fill Out Salesperson Setup Documents**

Complete all required salesperson setup documents, including but not limited to:

- Personal Information Form
- W-9 Form
- Direct Deposit Authorization
- Non-Disclosure Agreement (NDA)
- Any additional documents provided in your onboarding package

Ensure all information is accurate and up-to-date. If you have any questions or require assistance, reach out to Josh at [josh@syllolutions.com](mailto:josh@syllolutions.com).

### **2. Notification of Activation and Approval**

Upon successful verification and approval of your submitted documents, you will receive a notification confirming your activation as a salesperson at Syлло. This step is crucial for initiating the next stages of onboarding.

### **3. Connect and Login to CRM**

Access to our Customer Relationship Management (CRM) system is essential for managing and tracking your sales activities. Follow the steps below:

- You will receive login credentials via email.
- Visit <https://syлло-solutions.odoo.com/web/login> and enter your provided username and password.
- Familiarize yourself with the CRM interface and explore available resources or training materials.

### **4. Final Onboarding/Check-in with Jen (Account Manager)**

Schedule a meeting with Jen, our dedicated Account Manager, to finalize your onboarding process. This session will cover:

- Overview of our healthcare software products and services
- Sales strategies and best practices
- Any specific questions or concerns you may have

Coordinate with Jen at [jenn@syllolutions.com](mailto:jenn@syllolutions.com) to set up a convenient time for this meeting. Congratulations on taking these important steps towards becoming an integral part of Syлло Solutions. We look forward to your contributions and success within our team!