

Getting Started Agency Guide

Follow these steps to set up your account and ensure a smooth onboarding experience for your agency and clients.

1

Set Up Your Password

Upon receiving your welcome email, follow the link provided to set up your password.

2

Watch the Overview Video

Get a quick overview of meshVI's features by watching this 11-minute video:

[Watch Now](#)

3

Access Additional Guides

For further details and guides, explore our support resources here:

[meshVI Guides and Resources](#)

4

Add Necessary Users

Add all necessary users within your agency, ensuring each team member has the correct access. Need help adding client users?

Watch this video guide: [How to Add Client Users](#)

5

Add Clients

Add client users to get started. If you need assistance, refer to our guide: [How to Add Client Users](#)

Share the [Getting Started with meshVI - Client Guide](#) to help clients get onboarded smoothly.

6

Distribute additional marketing documents and other relevant information as needed.

Add Policies

Ensure all client policies are added and up-to-date.

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Review and Follow Key Resources

Familiarize yourself with the onboarding checklist to streamline your process:

[System Onboarding and Practice List](#)

Review available training materials to ensure your team has everything needed to use meshVI effectively: [Training Resources](#)

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Explore Integrations

Set up and explore meshVI's available integrations to maximize system functionality:

- Acord
- SambaSafety
- ePayPolicy
- Simply Easier Payments
- Carrier Software
- TruckerCloud
- Bluewire

