# Getting Started
# Client Guide

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

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

### Review Client Information

Ensure that your client data is correct and complete.

5

### Add Necessary Users

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

Watch this video guide: How to Add Client Users

6

### Confirm Policies

Verify that all policies for agencies using meshVI are listed. If any policies are missing, contact the agency to have them added.

7

### Review Key Information & Client-Level Features

- Driver List: Check that all drivers are listed accurately.
- Vehicle List: Ensure all vehicles are entered and up-to-date.
- Mileage/Revenue Page: Review details here for accuracy.
- Reporting Settings: Reports will appear based on your policy dates and settings. If they're not visible yet, they'll populate as per your policy.
- Acord Forms: Review client-level and vehicle Acord forms for accuracy.
- ID Cards: Check your ID cards to confirm that all details are correct.

### Explore Integrations

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

- SambaSafety Integration - Qorta (if applicable)

To learn about running MVRs, please complete this form: SambaSafety Form


## Contact Us

support@meshvi.com

Click to Access Support Page