How to Set Up Your Levelset Account

LEVELSET
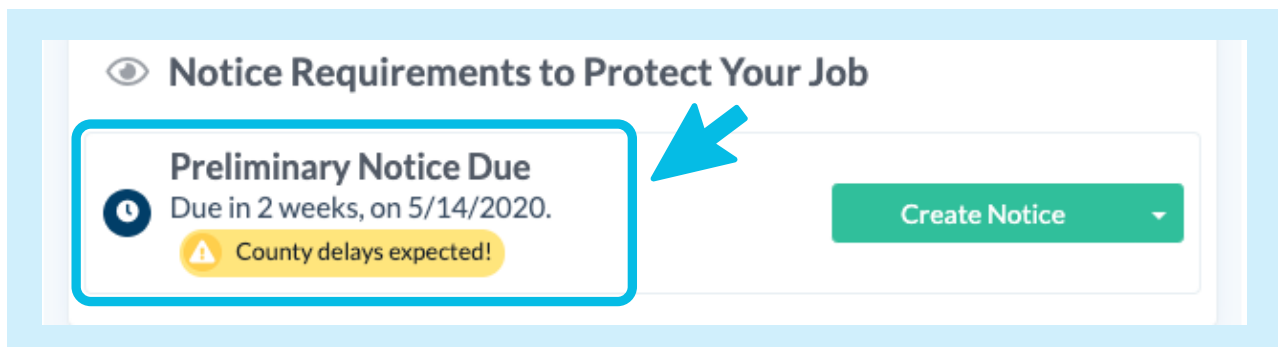Customer Education

Welcome to our community of thousands of contractors and suppliers making construction payment fast, easy, and friendly. Now that you have access to your new account, follow these five easy steps to start using Levelset.

1 **Step One: Add a project.** The first step of using Levelset is to start adding projects. You can do so by clicking the **"Create"** button in the top left hand corner of your account. For more tips on how to add a project, check out our step by step instructions for **How to Add a Project.**
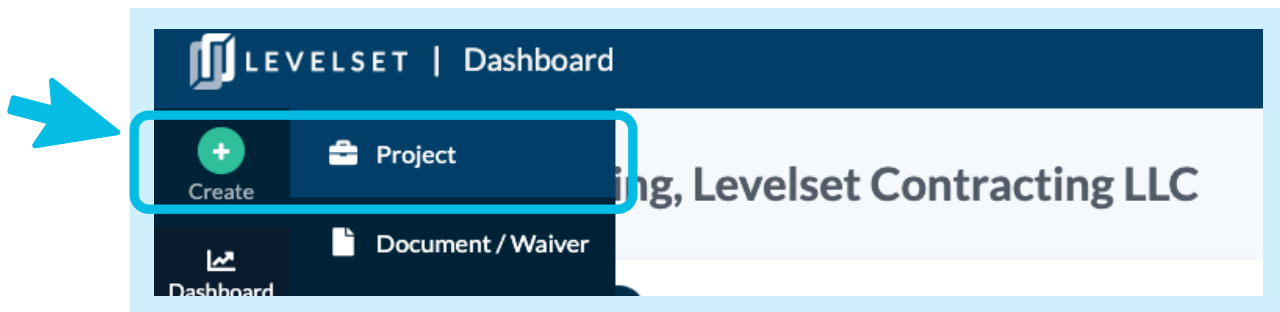
2 **Step Two: Know your next steps.** Once you add a project, you can head to your job summary page (found in the **"Projects"** page on the left hand side of the account) to see which documents you're required to send based off of the specific job information and when to send them. Fill in your dates so we can track those deadlines for you! For more information on how to use the deadlines section check out our step-by-step instructions, **Job Summary Page to Send the Right Document at the Right Time.**

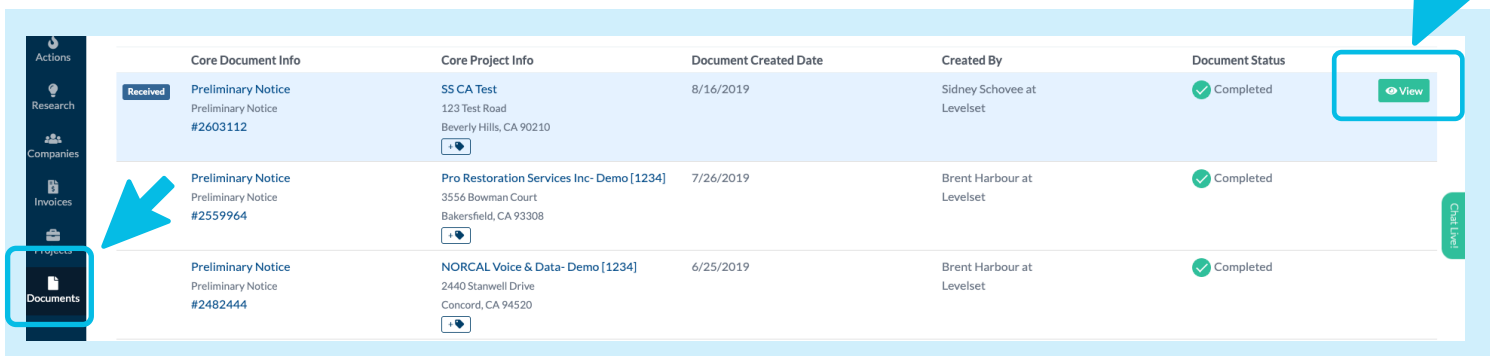**3** **Step Three: Confirm your Scout Research preferences.** All Levelset customers have some level of Scout Research included in their plan. Scout Research validates and fills in gaps in your data where needed. Before sending your first document, review and customize your Scout Research preferences by clicking the gear icon in the top right hand corner of your account. Check out our guidelines for **How to Set Your Scout Research Preferences**.
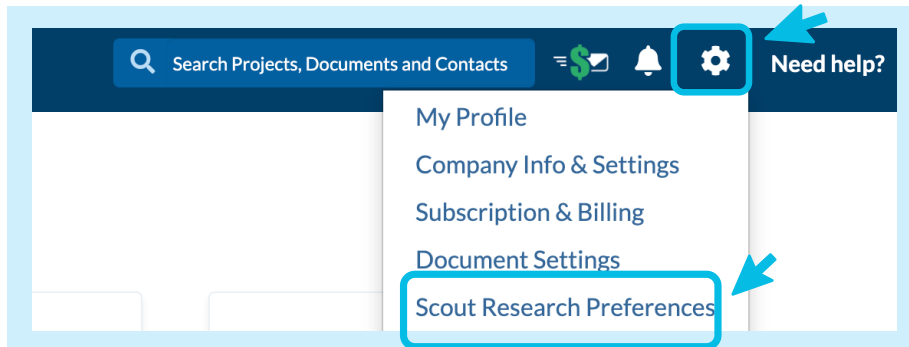
4 **Step Four: Create your first document.** Follow the steps on the job summary page to order the documents Levelset recommends. Or, click the **"Create"** button again in the top, lefthand corner of the account and select **"Document/Waiver"** to explore all the document options your Levelset account has to offer you!
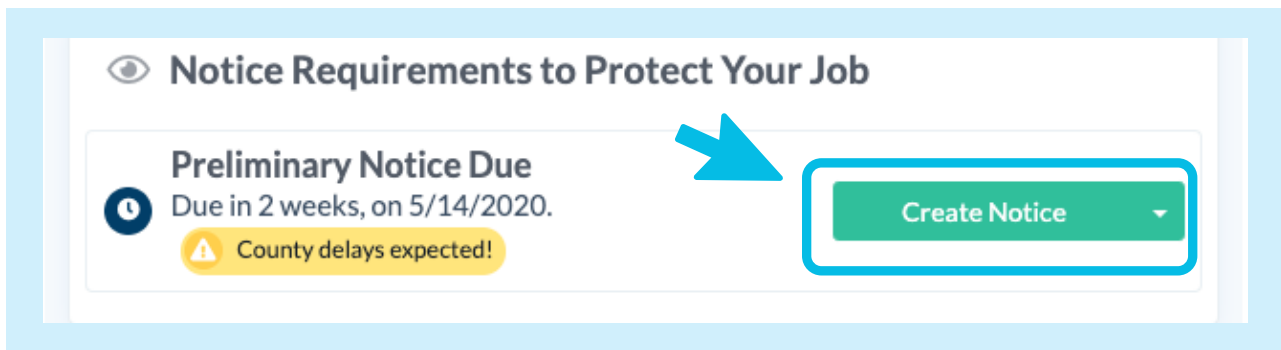
5 **Step Five: Track your order.** Once Levelset sends your document, we'll upload final copies and USPS tracking information (if applicable) under the document's details in your account. Find this by clicking **"Documents"** on the bottom, left hand side of your account, hovering over the document, and clicking **"View"**. Make sure to keep an eye out for any alerts from the Scout Research team!

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Need help? Call the Levelset Five-Star Support Team at 855-927-2737 or email mail@levelset.com.