Message Sent

Waiting for response...

Gmail

Search mail

Compose

Inbox 2

Starred

Snoozed

Sent

Drafts

GMass Auto Followup 1

GMass Reports 1

GMass Scheduled 1

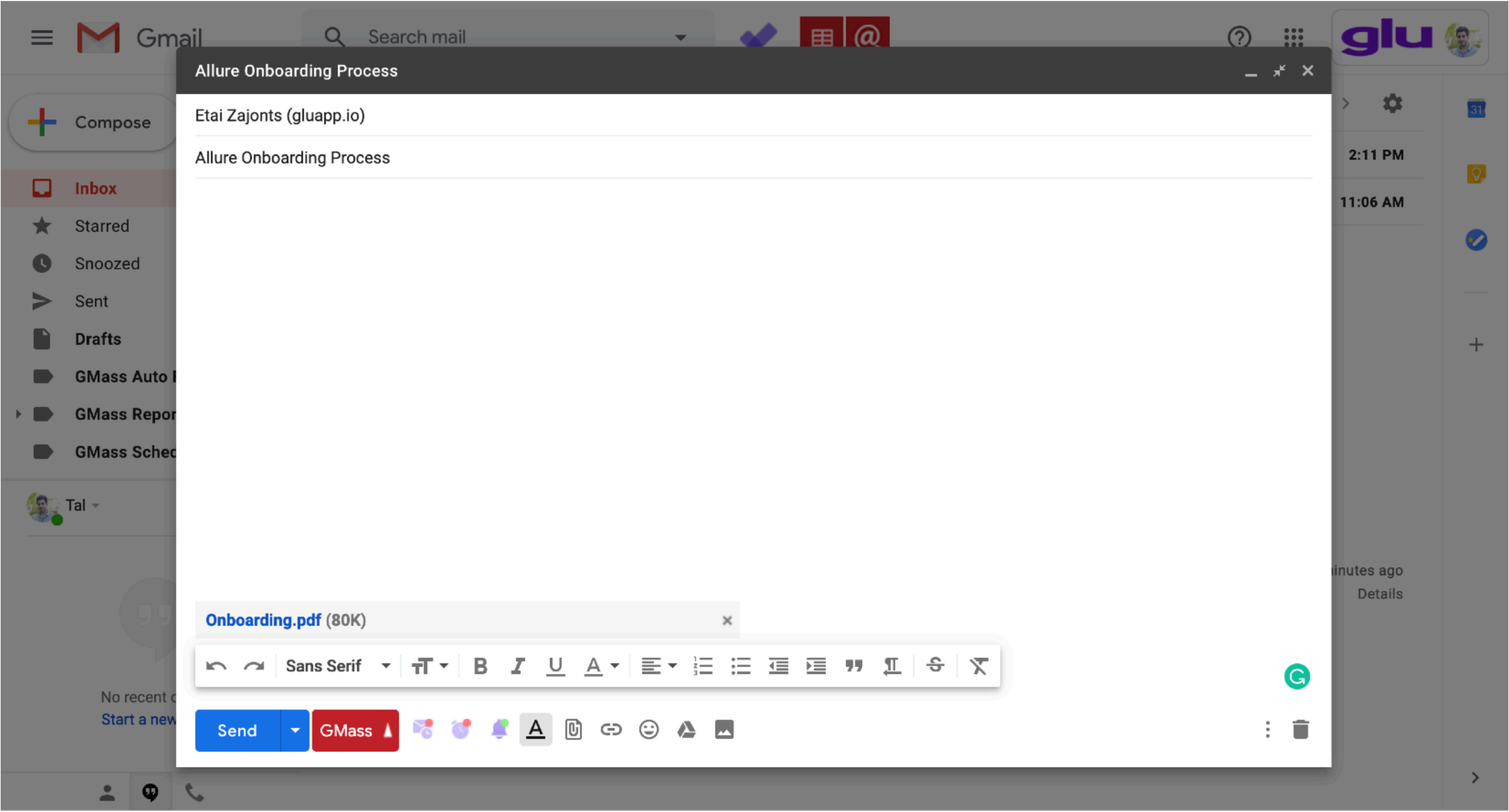
Tal

No recent chats

Start a new one

1–2 of 2

CustomerSuccess.Net.	**Tal, you have 40 new colleagues, 58 new notifications, 1 message and 41 group updat…**	2:11 PM
CustomerSuccess.Net.	**Top post for you** - Here's a post you might have missed Paul Duffy posted in Scaling Cu…	11:06 AM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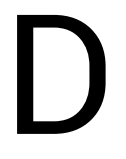
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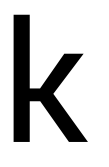

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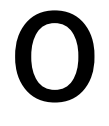

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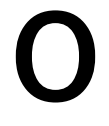

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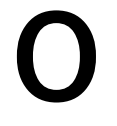

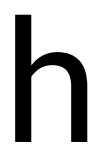

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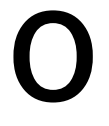

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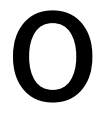

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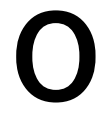

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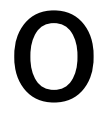

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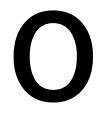

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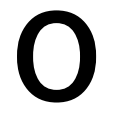

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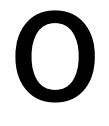

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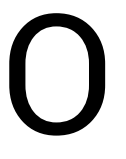

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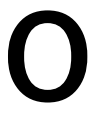

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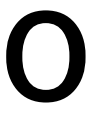

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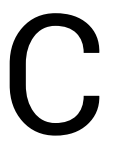
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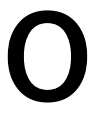

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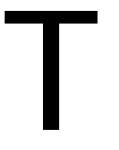

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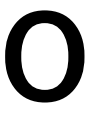

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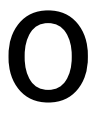

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Email

Onboarding Follow up

Hi David,

Thank you for the kick-off call. It was really nice for me to hear more about your needs and how Pleo can help. I just wanted to quickly recap our call so that you know what to do next.

Areas covered:
- First transfer to Pleo under "Wallet"
- Inviting team members under "Teams"
- Ordering cards under "Plastic cards"
- Setup with your account setup under "Settings"
- Categories and Sub-categories under "Settings - Categories"

Next actions:
- Make the first transfer
- Invite Team
- Order cards
- Connect account system
- Set up subcategories with Tax codes

:

glu

Onboarding Process

allure

Step 1 — Step 2 — Step 3 — Step 4 — Step 5

Setting up your store

Awaiting

Import reviews from your current provider

See More

In Progress

See More