REVVER

New Experience Start Guide

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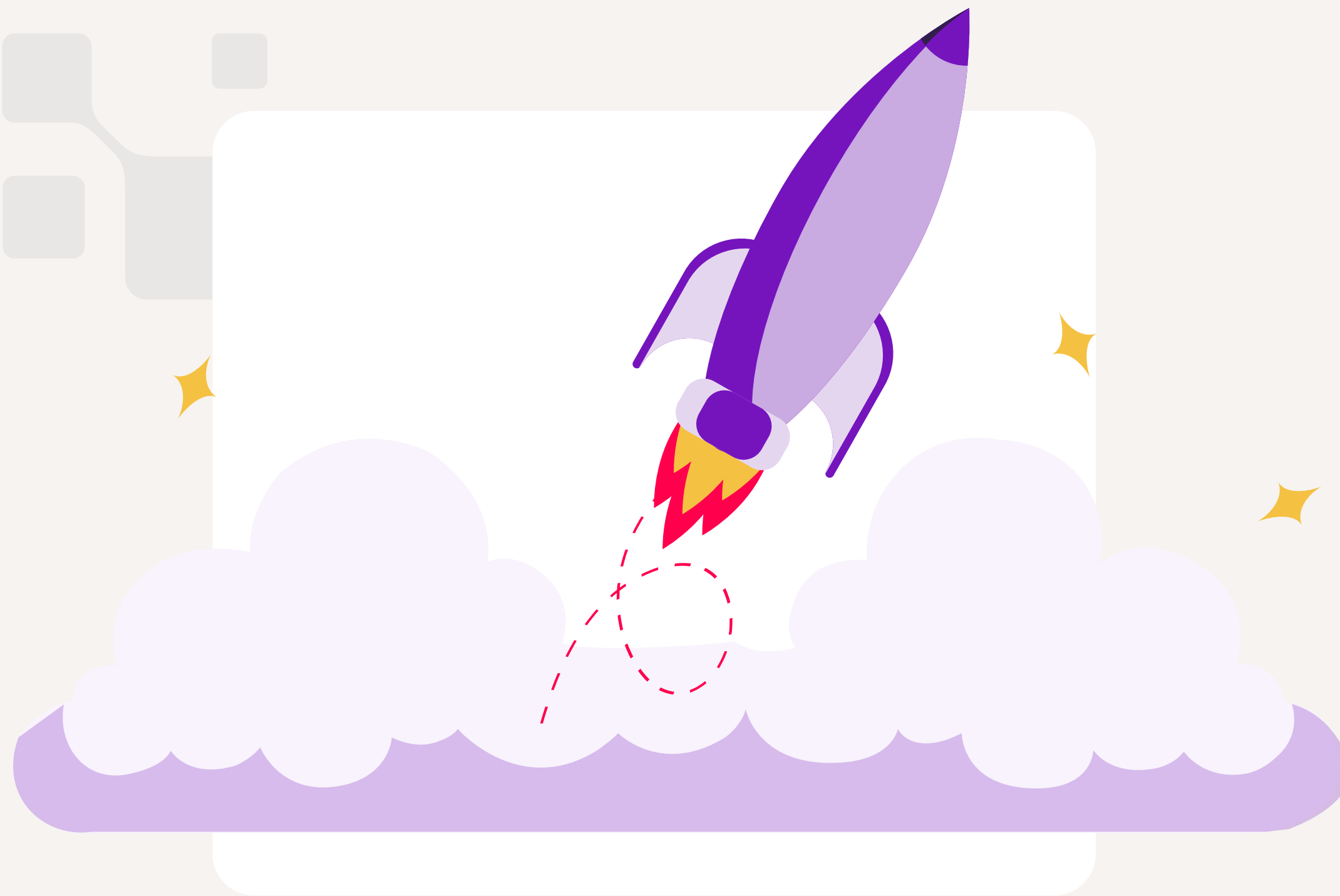
Welcome to the new product experience!
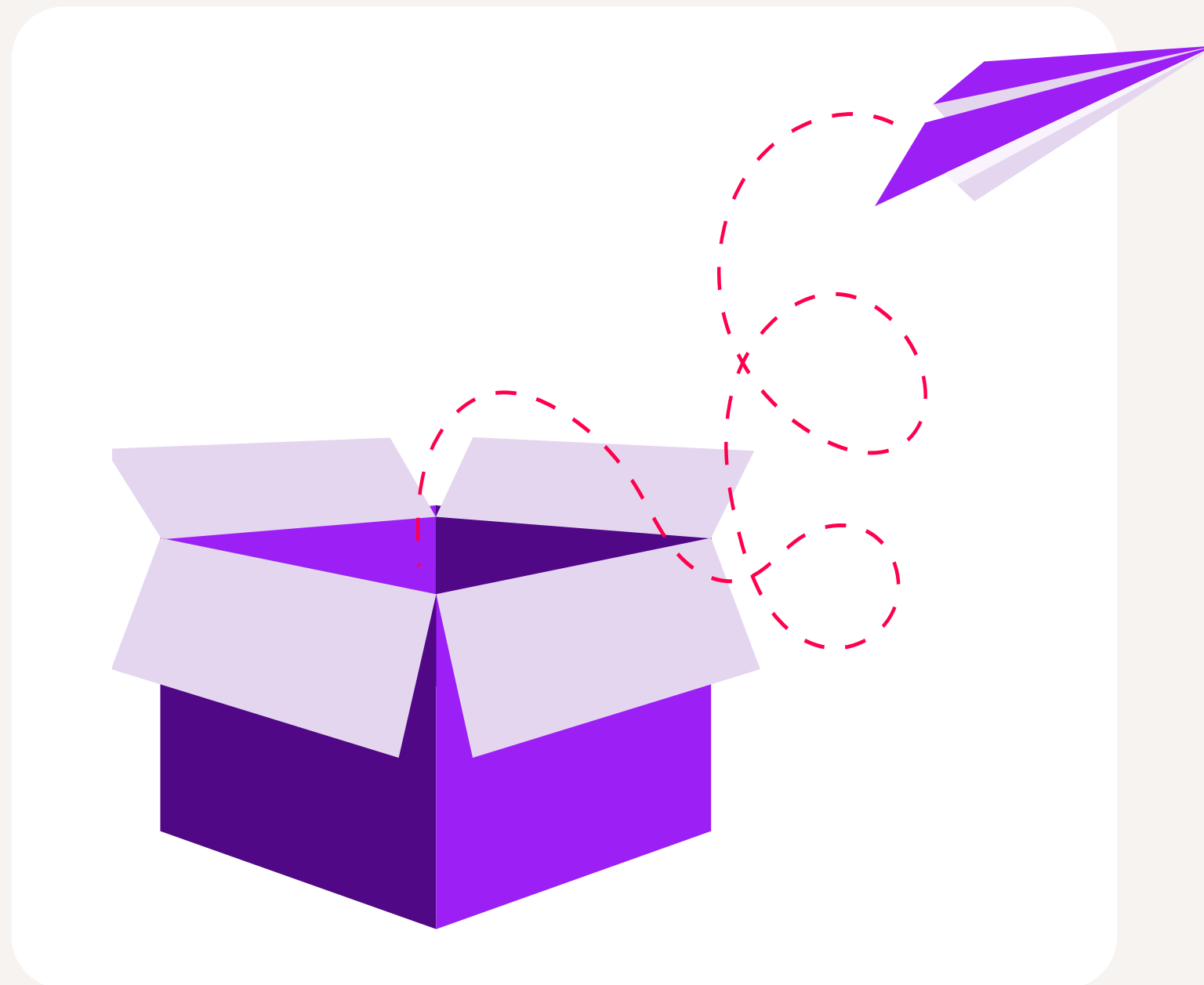
Our goal with the new and improved Revver product is to help you more easily and efficiently manage your document-dependent work. You will find an easier to use modern design, updated navigation making the most valuable and frequently used features always available, and a new homepage that surfaces the most important documents and work that apply to you.

The sections below provide more information on the changes you'll see, tips for navigating the new design, and highlights of key benefits delivered in this update.

We're excited for you to get started and move with us into the future of document-dependent work!

Simpler, More Useful Navigation

You'll notice the header and side navigation bars are new and improved! Here are some quick tips for what's changed, including a list detailing where things used to be and where they are now, in case you're having trouble finding a function that was moved.
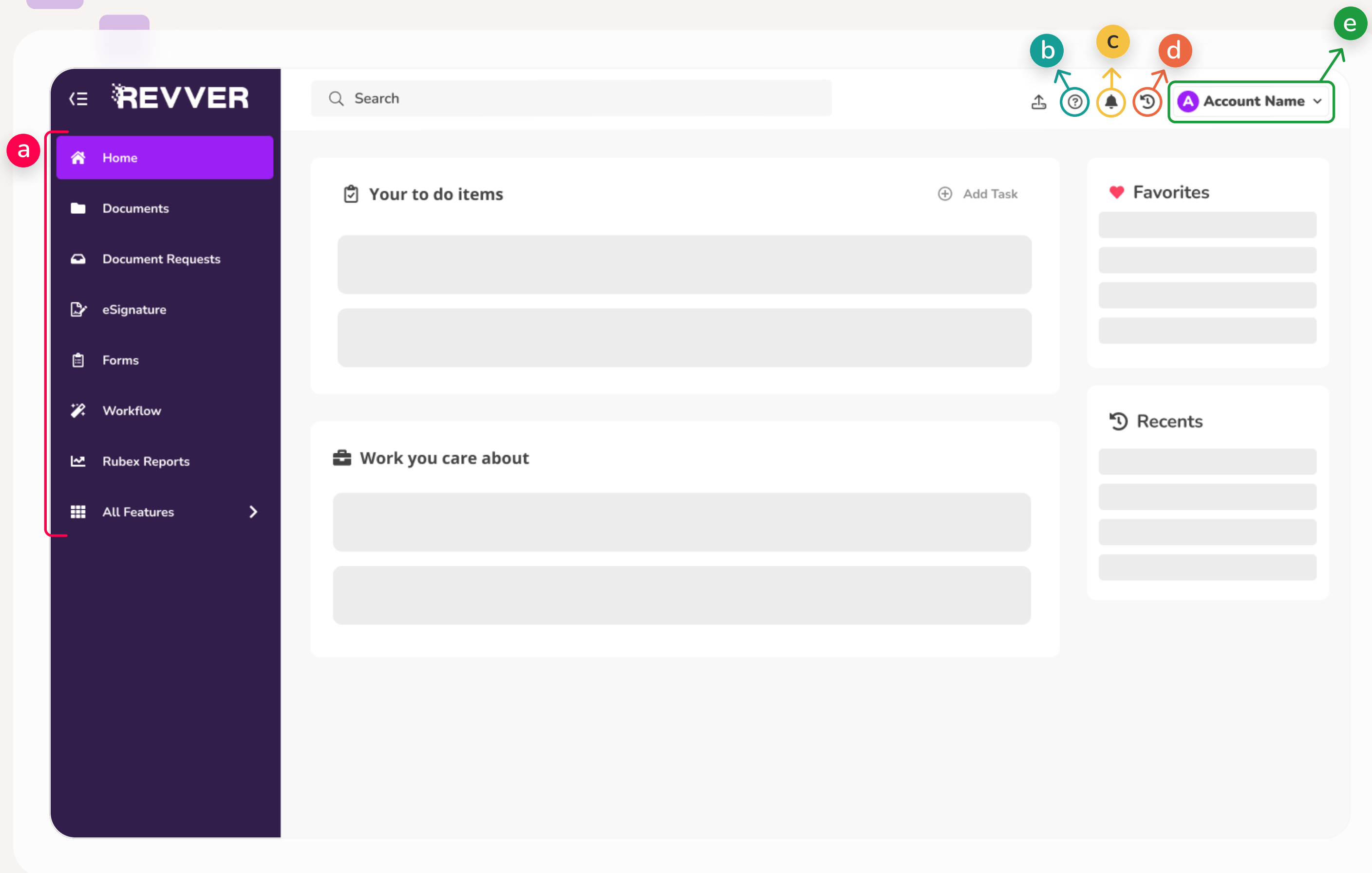
(a) Navigation Bar

The most valuable and frequently used features are always available on the left side navigation bar, which can be collapsed to save space.

(b) Help Menu

This now includes links to our knowledge base, to our new product updates page, as well as a way to provide feedback (we want to hear from you!).

(c) Notifications

An easy way to see the most important updates around documents and work across your account.

(d) Recents

A quick way to access your recently used documents and folders from any page.

(e) Account

A menu with quick access to your account settings and an easy option to switch accounts (if you have more than one).

All Features Menu

The All Features menu lets you see and quickly access every feature/function available in the product.
(Hint: If you're looking for something, try here first.)
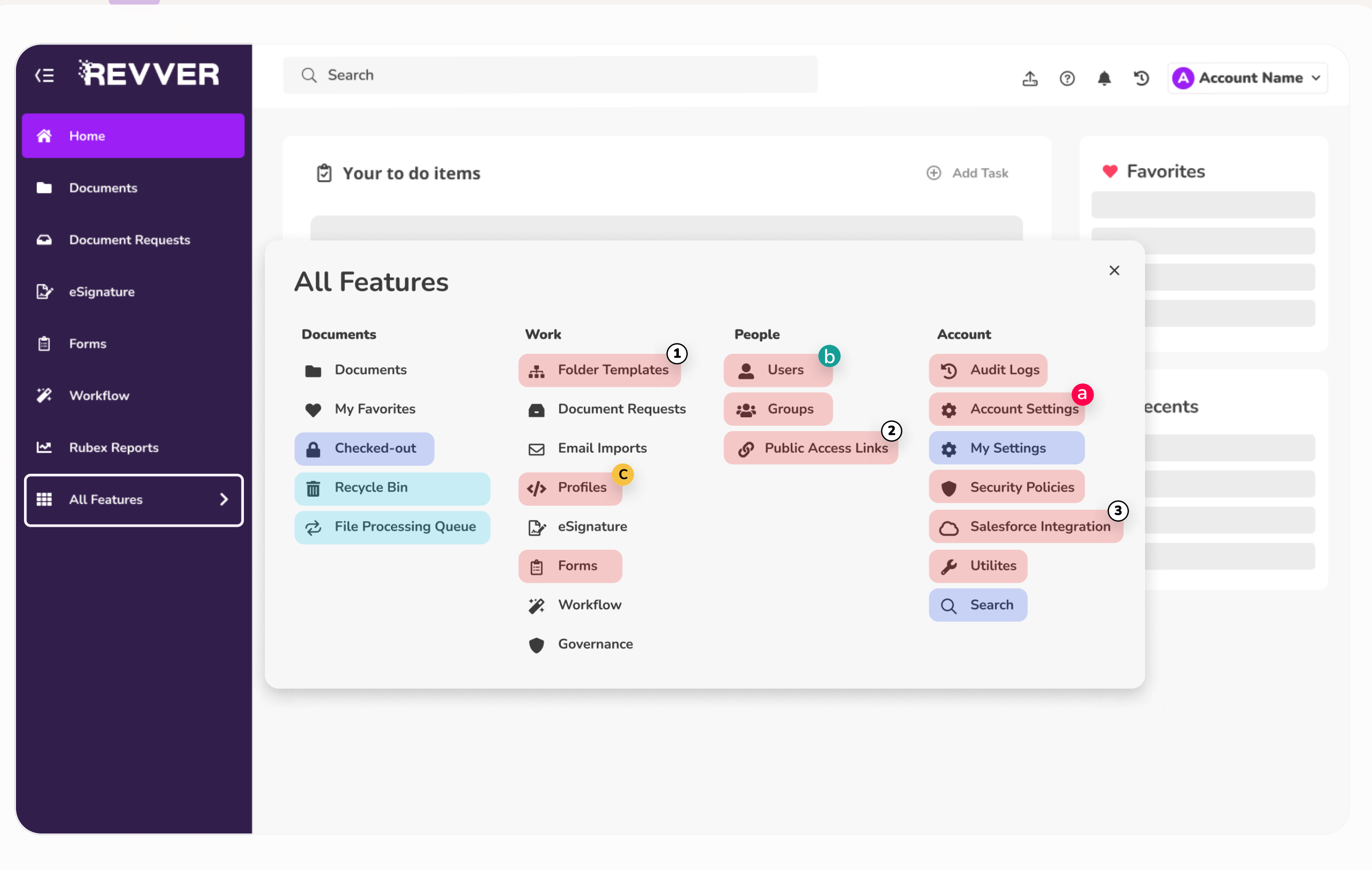
Navigation Differences

- 🔴 Previously under "Admin"
- 🔵 Previously under "Document Management"
- 🟣 Previously under the collapsed menu ☰

Name Changes

① Previously called "Template Libraries"

② Previously called "Instant Sign-in / Access Links"

② Previously called "Salesforce Management"

Nested Pages

ⓐ Under "Account Settings"
- Single Sign-On Settings
- Branding
- Email Imports

ⓑ Under "Users"
- User Sessions
- User Directories

ⓒ Under "Profiles"
- Profile Items

REVVER

Search

Account Name

- Home
- Documents
- Document Requests
- eSignature
- Forms
- Workflow
- Rubex Reports
- All Features

Your to do items — Add Task

Favorites

ecents

All Features

Documents
- Documents
- My Favorites
- Checked-out
- Recycle Bin
- File Processing Queue

Work
- Folder Templates ①
- Document Requests
- Email Imports
- Profiles ⓒ
- eSignature
- Forms
- Workflow
- Governance

People
- Users ⓑ
- Groups
- Public Access Links ②

Account
- Audit Logs
- Account Settings ⓐ
- My Settings
- Security Policies
- Salesforce Integration ③
- Utilites
- Search

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New Work-Oriented Home Page

Now, instead of your home page only giving you access to your documents, you'll see a tailored homepage designed to surface documents and work that apply to you, so you can easily find and accomplish your most important work.

a **Your To-do Items**

Here you'll find any work that is specifically waiting on you. This could be a document request, a workflow, or an eSignature. It also lets you quickly and easily create and mark off your own personal tasks.

b **Favorites**

This shows any documents or folders that you have added to your favorites or a personalized collection you've created. It also includes a link to your full list of favorites/collections (formerly known as portfolios).
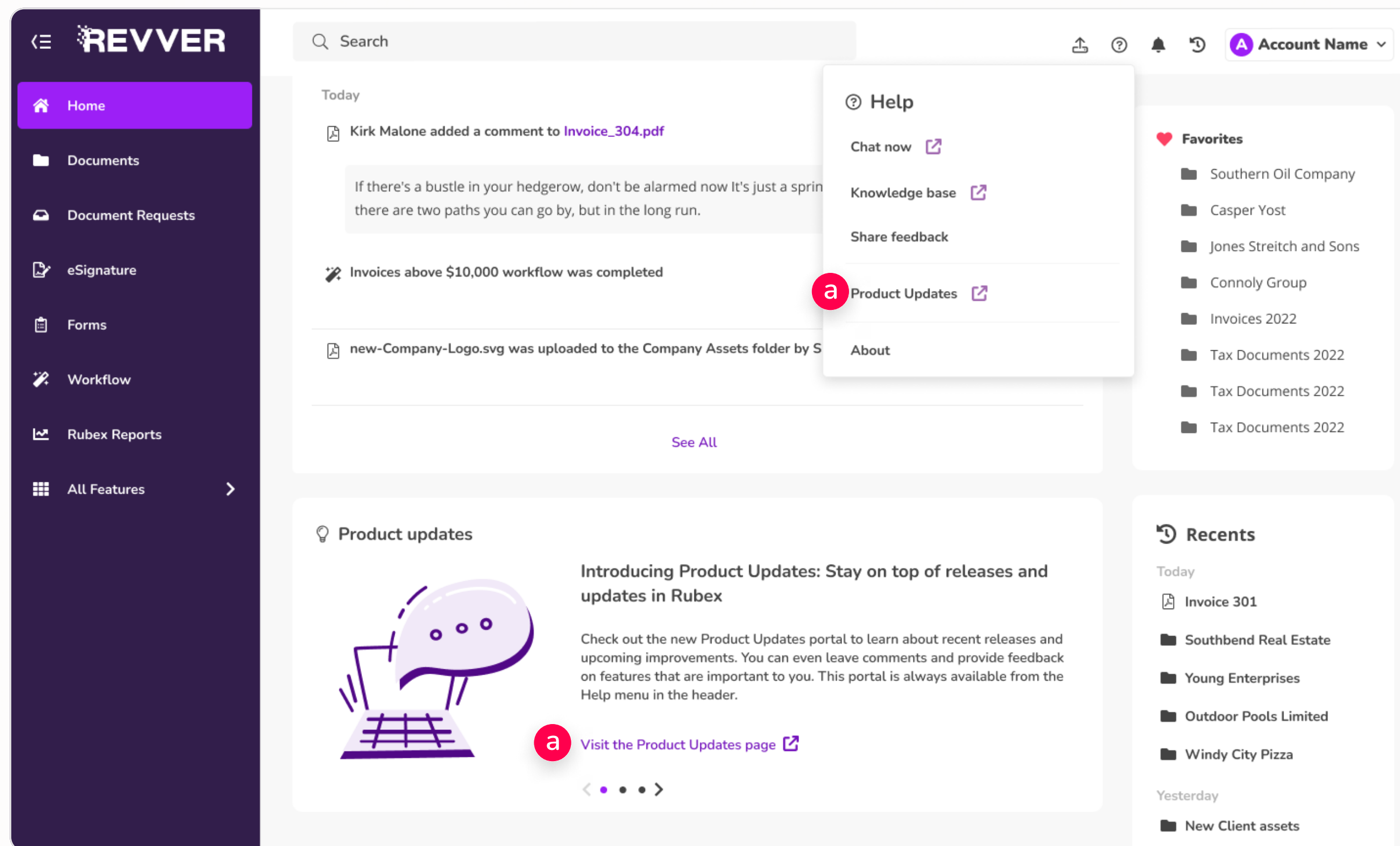
c **Recents**

This shows the documents and folders you've used most recently, sorted by when you used them. This makes it easy to jump right back into something. (Note: Recents are also accessible via the header from any page.)

d **Work You Care About**

This section lists things happening across your account that you'll want to be aware of. This could be files shared with you, activity in your folders, or updates to workflows that you're part of. Simply click through to anything you're interested in.

New Product Updates Page

Stay up to date with all Revver news! This includes upcoming and recently released improvements to the product, as well as an opportunity to provide feedback.

(a) Product Updates Link

Wondering what you might have missed in recent releases? Curious what product enhancements we have planned or in progress? Our new Product Updates page allows you to learn about recent releases and upcoming improvements, as well as provide feedback to our product team and get notified about any updates. This is accessible from the header or the bottom of the home page. Visit regularly to stay up-to-date on exciting product news.