



IMPLEMENTATION AND ONBOARDING WITH REVVER:

AN FBFS GUIDE FOR SUCCESS



Using Revver for document management across your agency increases efficiency and productivity, and helps you to achieve seamless digital experiences while satisfying Farm Bureau's security and compliance requirements.

In this guide, you'll learn how to introduce new strategies of success across your processes, starting with a successful implementation of Revver. You'll learn about one-on-one onboarding and support sessions you can book to guide you through implementation, along with the key features available to all FBFS agents with a Revver Corporate Account.

About Revver

Revver is a provider of intelligent document management solutions, allowing users to store and manage all aspects of client documentation. Revver is the digital document solution recognized and trusted by FBFS to digitally store all business documentation and streamline document work.

With Revver, FBFS agents can centralize and automate document work to focus less on paperwork and more on clients.

Getting Started

Sign up in the Marketing Toolkit to begin your digital documentation journey. For a comprehensive look at how to sign up for and download Revver, view our Start Guide.

Personalized Onboarding

After following the steps outlined in the Start Guide, you'll have full access to your Revver account. You can immediately start using Revver to upload and access your documents in a collaborative environment. You can directly import files from Windows and OneDrive so your files are centralized and accessible to all office staff.

[Book a one-on-one strategy session](#) with Revver's dedicated FBFS expert to show you how to get the most out of your Revver account. In this session, your CSM will introduce you to the Revver features and provide solutions to your process-related slowdowns.



Feature Highlights

Revver has an extensive suite of tools that will enable you to achieve more in less time. While the features below are not a comprehensive list of all of the Revver features available to you on your FBFS Corporate Account, we've highlighted the features and elements that you should begin to familiarize yourself with that will be most beneficial to you as you digitize and streamline your document processes.

Book a one-on-one strategy session at any time to get a personalized demonstration of how to use each of the following features.

DIGITAL DOCUMENT STORAGE

Physical documents require extra time, space, and labor to locate them. Unlike physical storage solutions, Revver is not limited by storage space restrictions. Storing documents digitally is one of the simplest, yet most impactful things you can do across your agency.

Digital documents can be uploaded into Revver in several ways:

1. Dragging or clicking to upload documents
2. Uploading an image via mobile device on web browser
3. Using Windows & OneDrive data migration with Revver's bulk import tool

Revver's digital documents are stored in a similar hierarchy to documents stored within physical filing cabinets (drawers, folders, files, etc.) so that teams can easily adapt and lessen the learning curve. Storing files digitally diminishes the need for physical filing cabinets, saving space and clutter across the office. Additionally with digital files, compliance regulations regarding document retention and disposal are significantly easier to manage.

CLOUD-BASED DOCUMENTS

Revver stores all files securely on the cloud so users can store and access their information from anywhere. Whether they are collecting information from clients out in the field or are working remotely, entire teams can execute collaborative document work regardless of their geographic location.



FOLDER TEMPLATES

Agents can replace time previously spent manually creating folders and pertinent client files with an increased focus on clients using Folder Templates. Automated Folder Templates give users the power to create predetermined folder structures filled with all client forms with just one click.

FBFS Compliance and Agency Services has created an extensive Folder Template Library for agents and staff to apply to their Revver paperless office structure. Use of these Folder Templates ensure consistency with folder names, reduce human error, and automatically set and follow governance and retention rules.

SEARCH

Digital documents stored within Revver can be found within a few seconds every time. Misfiled or mistitled documents—and

the hours spent searching for them—won't delay your processes any longer. Find files with full-text search (yes, even for scanned documents). Additionally, Advanced Search enables you to find a document based on a wide range of search criteria including date created, user uploaded, notes, etc.

DESKTOP APP

Users can obtain quicker and more convenient access to Revver and its suite of tools in the Desktop App. Everything will be accessible directly on your desktop instead of having to navigate to the Revver website every time you need to access your documents.

Users can obtain access to additional Revver features and add-ons exclusively within the Desktop App.

- Watch Folder—Users can specify that a folder on their desktop is “watched.” This means that all the contents added to this folder will be automatically displayed in the Revver upload queue. Once the file is successfully uploaded to Revver, it will be removed from the watched folder on their computer.
- Printer Add-On—Users can select the option to “print to Revver,” automatically creating a PDF version of the document ready for storage in the Revver upload queue.
- Scanner Add-On—Users can set their scanner as the source to scan directly to Revver, automatically creating a PDF version of the document ready for storage in the Revver upload queue.
- Microsoft Office Add-On—A shortcut with a “Send to Revver” button is added to the Ribbon in Word, Excel, Outlook, PowerPoint, etc.

SECURITY

Access to the FBFS Revver account requires Single Sign-On using your Homefield credentials. This provides the additional benefit of not needing to remember or manage a Revver-specific password. Azure SSO also ensures that only active FBFS employees and personnel can access client files. All files are encrypted in transit and at rest, protecting all the data stored within a document.



SUPPORT AND TROUBLESHOOTING

Revver prides itself on its accessible support. It provides direct support with your CSM as you begin to learn the product, chat support for technical questions, and a Help Center to guide you through Revver best practices.

One-on-One Sessions

Your CSM isn't only available to help with implementation. Open sessions are available for FBFS agents to book any time they need extra help navigating Revver for better digital document management.

Chat Support

At the top of the Revver screen within the product, you can find a question mark button. This will open up a menu with various useful options. You can select "Chat Now" to be brought to a live chat with the Revver Support Team.

Help Center

Navigating to "Help Center" will bring you to a page full of articles that can guide you through various support articles written by our team to follow best practices for Revver document management.

Get Started With Revver and Build Your Paperless Office

[Book One-on-One Strategy Session >](#)



4101 North Thanksgiving Way
Suite 200
Lehi, UT 84043
www.RevverDocs.com

© 2024 eFileCabinet, Inc., DBA Revver. All rights reserved. Revver, Revver Reports, the Revver Blocks, eFileCabinet, the eFileCabinet logo, and Rubex are trademarks or registered trademarks of eFileCabinet, Inc., DBA Revver. Other marks may be trademarks or registered trademarks of their respective holders.