

Installing the Rev-IQ Retention and Customer Success Kit in Perplexity

How to add the 5 skills in your bundle to your Perplexity account and run them for the first time. It takes about five minutes.

What you downloaded: either the whole bundle as one .zip (Rev-IQ-retention-and-customer-success-kit-perplexity.zip), or individual skill files from your download page. This is the Perplexity version. If you have the whole bundle, unzip it first: inside is one .zip per skill, this guide and a README. Upload each skill's .zip to Perplexity as it is. Don't unzip the individual skill files.

Which plans work

Skills work on every Perplexity plan that includes Computer: Pro, Max, Enterprise Pro and Enterprise Max.

Before you start

- Make sure you can open **Computer** in Perplexity.
- Use the Perplexity version of the skill. It's packaged differently from the Claude and ChatGPT versions.

Install the skills

1. If you downloaded the whole bundle, unzip it. On a Mac, double-click it. On Windows, right-click it and choose Extract All.
2. Open Perplexity and go to **Computer**.
3. Go to the **Skills** page.
4. Select **Create skill**, then **Upload a skill**.
5. Drag in one skill's .zip file, or click to browse for it.
6. The skill is saved to your skills and is available in future Computer conversations.
7. Repeat for each skill in the bundle. Each one appears separately in your skills list.

Run them

Start a new Computer task and ask in plain language. Computer loads the skill when your request matches what it does. To be certain, name it: "Use the Rev-IQ Onboarding Plan Builder skill." Attach files such as a customer list, account notes or a ticket export when asked.

What's in your bundle, and a prompt to start each one:

SKILL	TRY ASKING
Rev-IQ Onboarding Plan Builder	"Build the onboarding plan and scope document for our new customer."
Rev-IQ Customer Health Scorer	"Score the health of our customer accounts from this list."
Rev-IQ At-risk Account Save Plan	"This account is at risk of churning. Build a save plan."
Rev-IQ Quarterly Review Call	"Prep a quarterly review call with this customer."
Rev-IQ Support Tiers and SLA Designer	"Design support tiers and SLAs from this ticket export."

If something doesn't work

The upload is rejected	Make sure you downloaded the Perplexity version. The Claude and ChatGPT files have a different layout and won't upload to Perplexity.
The skill doesn't start	Name it in your message, and check it appears on your Skills page.
You can't see Skills	Skills are part of Computer, which needs a Pro, Max or Enterprise plan.
The bundle zip won't upload	The bundle file holds several skills, so it can't be uploaded in one go. Unzip it first, then upload each skill's .zip on its own.

Still stuck? Email joel.smith@rev-iq.ai with your order email, the skill name and platform.

Your licence and updates

Your purchase covers use within one business, including your team. Please don't resell, share outside your business or redistribute the files. Updates are included for 12 months from purchase: use the link on your download page to get the latest version.

Your data

The skills run inside your own Perplexity account. Nothing you enter or upload is sent to Rev-IQ. Perplexity AI's terms, your plan's data settings and your organisation's policies apply to what you share with Perplexity, so remove anything you're not comfortable sharing, such as personal contact details.

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