

Here's a full breakdown of timelines and responsibilities for essensys onboarding

PRE GO-LIVE CONFIGURATION Engagement Kick Off Call

Data Import sheet

Operate config Questionaire

PNG logo / hex colors portal branding / URL confirmed

Payment Gateway required / API keys

Credits / meeting discounts

Financial software requirements

Invoice / Licence Templates

Actions required from Kick Off Call

Questionnaire completed

Portal PNG logo / hex colors provided

Data Import returned by customer

DB configured / data imported

Portal Branded

Licence / Invoice Templates provided by customer

Licence / Invoice Templates built

Users invited

TRAINING

Operate Configuration call / Data Import of Products (1 training)

Menu Navigation

User Security / Profiles

Products check

Credits / Meeting Packages

Email Templates check

Member Experience Portal check

Confirm payment gateway works

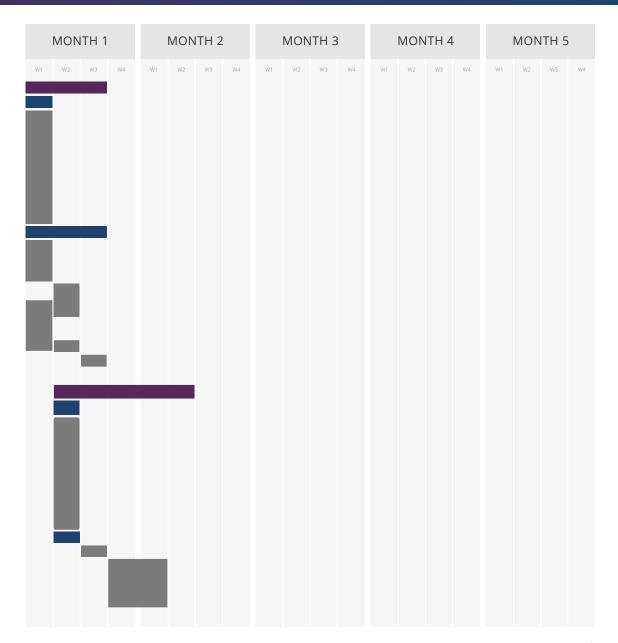
Operate Sales Module - pipeline / licences / eSign (2 trainings)

Sales best practice

eSign set up

Licence Configuration / Approvals

Licence Template Approval





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Onboarding workflows

Invoice template check

Operate Charges / Payments (2 trainings)

Adding fixed fees (licences)

Adding variable fees & calendar bookings / Connect Call Charges

Accounts Receivable / Payments

Operate Portal Training (2 trainings)

Portal overview

Templates check

Contact access levels / workflows

Invite existing members to portal

Troubleshooting

FIRST FULL MONTH LIVE

Monthly Billing (1st bill run and collections)

Moves Adds Changes / licenses advanced

Reports overviews

Financial Exports / Payments

ADOPTION STAGE CHECK IN

Weekly Check in

Month 2 Check in

Month 3 Check in

