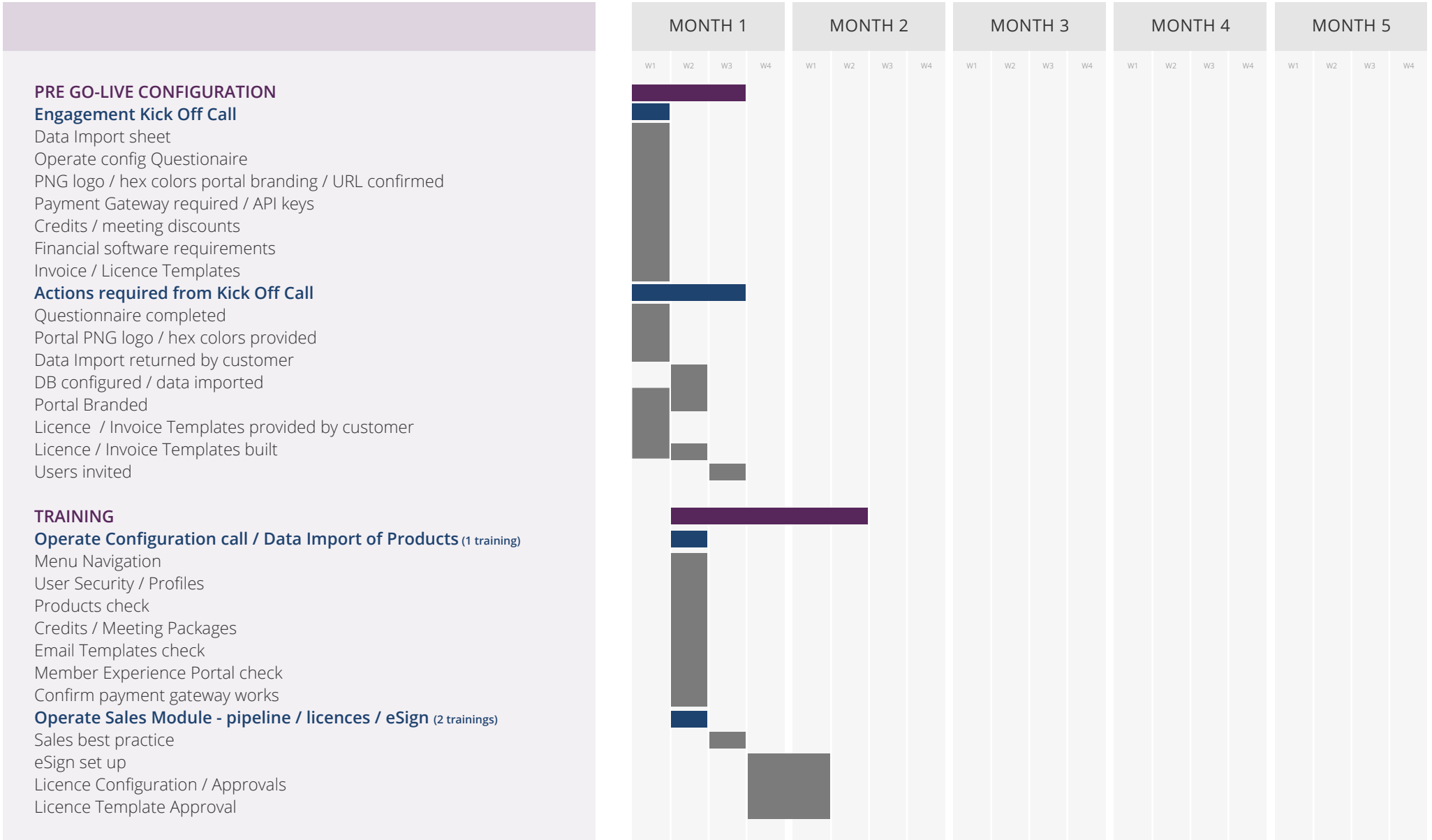


OPERATE MIGRATION ONBOARDING

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



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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

- TENANT COMMS SUGGESTED DEADLINES**
- New member portal initial notice
- New member portal - features / updating payment info
- Portal Invites to Customers from Operate (autopay / bookings)
- Checking you received portal invite / autopay signed up

