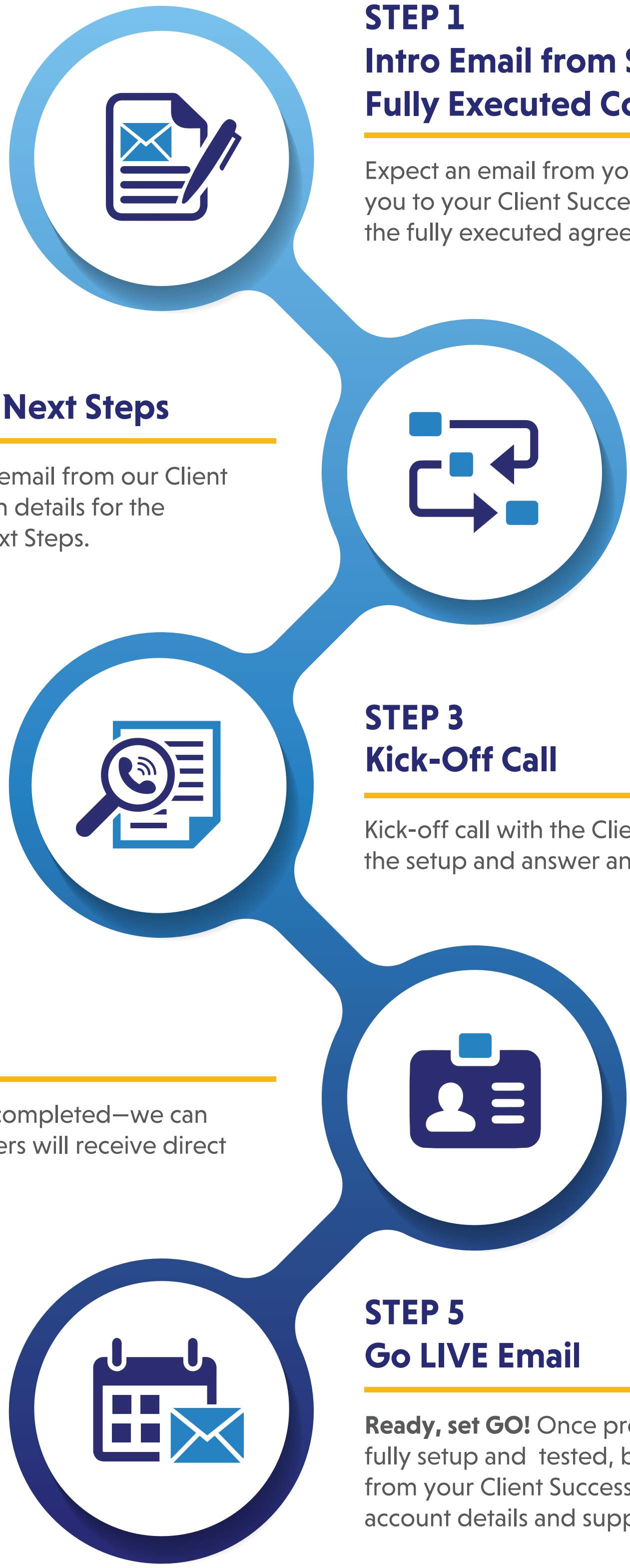
CUSTOMER SETUP



STEP 1
Intro Email from SA and Copy of Fully Executed Contract

Expect an email from your Sales Associate introducing you to your Client Success team as well as a copy of the fully executed agreement.

STEP 2
Welcome Email and Next Steps

You will receive a Welcome email from our Client Success team that will contain details for the Onboarding Process and Next Steps.

STEP 3
Kick-Off Call

Kick-off call with the Client Success team to review the setup and answer any implementation questions.

STEP 4
Establish Account

Once setup documents are completed—we can begin your profile setup. Users will receive direct email with login credentials.

STEP 5
Go LIVE Email

Ready, set GO! Once profile and hotline numbers are fully setup and tested, be on the lookout for an email from your Client Success team that will provide your account details and support contact information.