

# THE MINERALTREE ONBOARDING PROCESS

At MineralTree, we believe getting off to good start is the most important part of ensuring your long term success. When you move to MineralTree's AP automation solution you can expect a clear plan in place and we will make every effort to ensure there is no disruption in your current process.

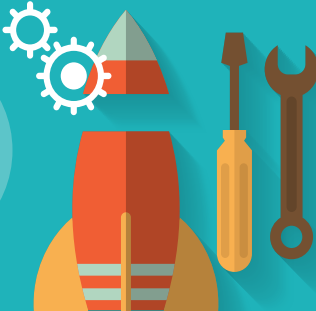
1



## Project Planning Call - 1 hour

- MineralTree Project Manager assigned
- Introduction to MineralTree Director of Customer Success
- Review your current AP processes
- Define expectations for onboarding and implementation

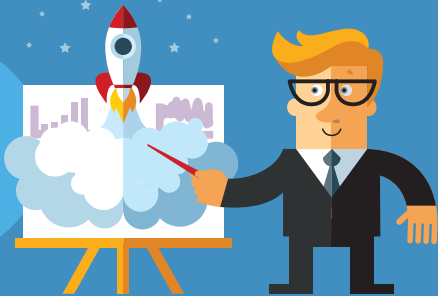
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## Implementation Call - 30 min.

- Initiate sync with your accounting system
- Install necessary connectors (if needed)
- Coordinate with consultants (if needed)

3



## Training - 1 hour

- Role-based user training
- Review of training resources

4



## Sign-off - 30 min.

- Confirmation that configurations are complete
- All users are fully trained by this stage

5



## Health-Check - 1 hour

- Director of Customer Success will check-in to see how you are doing
- Review of any additional training needs
- Support intervention (if needed)