



# Onboarding Overview

The first few weeks are crucial for the successful implementation of Float as your company's new financial platform. But don't worry - our team is here to help ensure a smooth transition. This document outlines key milestones and our high-level plan we will work on together to simplify spending for your company and team.

**Your Implementation Manager will customize the timelines for you.**

**Price:** \$1,000 (included in Enterprise plan)      **What's included:** 60 day onboarding with 120 days of onboarding support

## MILESTONES

### Milestone 1: Getting Started

WEEK	KEY INITIATIVES	CUSTOMER INITIATIVES	SUCCESS METRICS
1	<ul style="list-style-type: none"> <li>📞 Complete Kick-off Call</li> <li>✔ Review KYB requirements</li> <li>✔ Set up Auto-Funding</li> <li>✔ Set up Accounting Sync</li> <li>✔ Set up Approval and Submission Policies</li> <li>✔ Create your first Float Card</li> </ul>	<ul style="list-style-type: none"> <li>✔ Submit KYB requirements</li> <li>✔ Connect bank(s) and fund Float account</li> <li>✔ Connect accounting software (or provide Bulk Import)</li> </ul>	Your first Float Card is created!

### Milestone 2: Team and Merchant Migration

2	<ul style="list-style-type: none"> <li>📞 Complete Spender Training Call</li> <li>✔ Add Users and assign Roles</li> <li>✔ Set up Teams (Pro Plan only)</li> <li>✔ Set up Reimbursements (Pro Plan only)</li> <li>✔ Review Merchant Migration</li> </ul>	<ul style="list-style-type: none"> <li>✔ Connect HRIS and import users (or provide Bulk Import)</li> <li>✔ Submit credit card statements</li> <li>✔ Select team training date</li> </ul>	Your company Spenders are added to Float
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### Milestone 3: Cards and Month-End

3	<ul style="list-style-type: none"> <li>📞 Complete Month-End Accounting Call</li> <li>✔ Set up cards with custom limits</li> <li>✔ Add Merchant Controls to cards (Pro Plan only)</li> <li>✔ Set up card-level accounting rules</li> <li>✔ Set up Transaction Rules</li> </ul>	<ul style="list-style-type: none"> <li>✔ Create cards for software, subscription, and ad spend</li> <li>✔ Create \$0 balance physical cards for employees</li> <li>✔ Change billing details at key vendors</li> </ul>	Float Cards are set up and distributed
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### Milestone 4: Start Saving

4	<ul style="list-style-type: none"> <li>✔ Final setup &amp; hand-off completed</li> </ul>	<ul style="list-style-type: none"> <li>✔ Distribute training materials and rollout to company</li> </ul>	Float is set up as your company's spend platform
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