

90-Day Onboarding Process

Part 1: Account Set-Up

STEP 1

Share User Information

You give us the following information for all STRATAFOLIO users:

- First and Last Name
- Phone Number
- Email
- User Access Level



STEP 2

Access to STRATAFOLIO

You'll receive an email to create an account and set up your User Profile in STRATAFOLIO



STEP 3

Complete QuickBooks Online/QuickBooks Desktop Set-Up

You will need to set up at least one invoice for every tenant in your QBO/QBD account



STEP 4

Provide Deliverables for Onboarding

You give us the following documents:

- Completed Intake Form
- Rent Rolls
- Tenant Lists
- Leases
- CAM Breakdowns
- Loans
- Investors
- COIs



90-Day Onboarding Process

Part 2: Go Live



STEP 1

Go Live for Invoicing

- Kick-Off Meeting
- QuickBooks Integration Completed
- Deliverables Received and Leases Entered
- Contact List Verified
- Question List Reviewed and Answered
- Portfolio Updated
- Rent Roll Verified
- Invoice Audit
- Invoicing is Ready in STRATAFOLIO



STEP 2

Go Live for Full Functionality

- All Loan Information Received and Entered
- Loan Report Reviewed
- All Investor Information Received and Entered
- Investor Report Reviewed
- Complete Verification List to Review All Data is Accurate and Complete
- 90-Day Onboarding Process Sign-Off



SUCCESS!

The onboarding process has brought you to a fully functioning set-up.

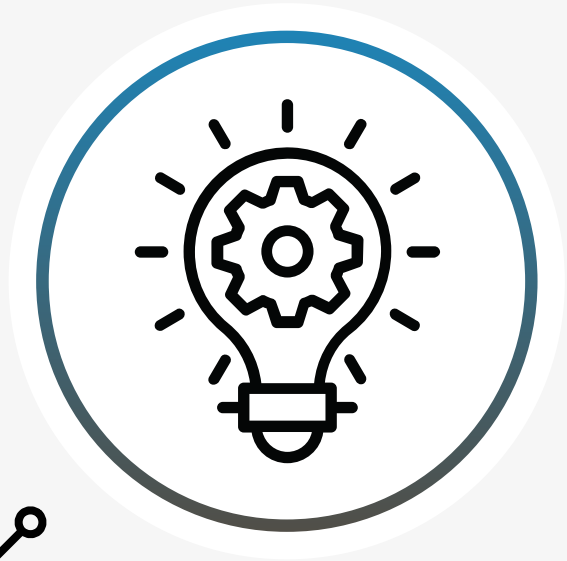
Post-Onboarding Support

Resources

KNOWLEDGE BASE

Getting Started Articles

- ▶ [QuickBooks Online Integration](#)
- ▶ [QuickBooks Desktop Integration](#)



Operations Articles

- ▶ [Creating Invoices](#)
- ▶ [Updating Leases](#)

Financials Articles

- ▶ [Adding Invoice Payments](#)
- ▶ [Updating/Adding Loans](#)



Assets Articles

- ▶ [Selling An Asset](#)
- ▶ [Automating Certificate of Insurance \(COI\)](#)

Investors Articles


- ▶ [Adding Lenders](#)
- ▶ [CAM Reconciliation Reports](#)



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