

## EXTRANCE ONBOARDING: KEY POINTS

### We Strive to Make Onboarding as Simple as Possible

EXtrance leads the market in onboarding speed -- with an average of six weeks to a full production environment. A dedicated account executive and implementation team will work hand-in-hand with your organization, ensuring no additional resources are required by your IT team. EXtrance simply needs access to your source data in any format or system(s) it resides within, and the ability to build integrations into third-party systems you may be using.

### The EXtrance Four Step Process

1

#### Preparation:

- Gather client IT environment details (network, hardware, software, security).
- Establish secure connections between client & EXtrance.

2

#### Integration:

- Migrate relevant data from client systems to EXtrance.
- Configure EXtrance services (access, security, integrations).
- Test functionality, data accuracy & security.
- Ingest fund data & structure as required by the client.

3

#### User Acceptance & Launch:

- Train client IT personnel & users on EXtrance usage & best practices.
- Make final adjustments to the EXtrance environment as needed.

4

#### Continuous Training & Support:

- White-glove support to make sure you & your team are comfortable with the software & able to pilot it on your own.
- Establish ongoing support channels for client assistance as needed.
- Continued support to ensure successful adoption of EXtrance.

### Other Items to Consider

- **Processes may vary based on client IT complexity.**
- **Open communication & collaboration are crucial.**

[EXtrance Support Team Contact Information](#)

## **AN EXTRANCE PARTNERED ORGANIZATION IS HIGHLY PRIORITIZED.**

By utilizing more than 40% of our solution, you'll become a preferred investment offering at major financial institutions.

Advisors and wealth management teams love providing their customers funds and investments that offer simple liquidity solutions, the ultimate security, and proper transparency. This gives the fund manager access to EXtrance's product offerings, reducing expenses, increasing profits, and providing a competitive advantage that only AI, ML and blockchain provides.

### **Schedule a demo**

to see how much EXtrance can revolutionize investment management.



**DISCOVER EXTRANCE.**

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**EXtrance**

**REVOLUTIONIZING  
INVENSTMENT MANAGEMENT.**

[EXtrance.io](https://EXtrance.io)