

Onboarding Packages



Adding new software into your tech stack doesn't have to be complicated. Our customer care and onboarding services can guide you through every step, from installation and training to ongoing support.

| | Self-Service Onboarding | QuickStart SmartHour | Assisted Onboarding | Enterprise Onboarding |
|--|-------------------------|----------------------|---------------------|-----------------------|
| Customer Care Support Our US-based team is available through online chat and email. | ✓ | ✓ | ✓ | ✓ |
| SmartVault Academy A self-paced learning site that'll help you master the skills needed to get the most out of SmartVault. | ✓ | ✓ | ✓ | ✓ |
| Specialized SmartVault Academy Custom SmartVault Academy courses that are specific to your workflows and needs. | | ✓ | ✓ | ✓ |
| Set-Up With Customer Onboarding Manager The Onboarding Manager will provide best practices for workflow, setup, and integrations. | | ✓ | ✓ | ✓ |
| Additional Sessions for Add-On Set-Up Use this time to dive deeper into additional features like Request Docs, eSignature, Docdown, Quoters, etc. | | | ✓ | ✓ |
| Admin Sessions Covers SmartVault Basics, customizing and setting up the account, understanding admin tools like billing, purchasing more licenses, custom branding, folder templates, etc. | | | ✓ | ✓ |
| Staff/Team Session We'll teach specific workflows for each team (for example: teaching admins how to use Request Docs for onboarding). | | | ✓ | ✓ |
| Champion Session Training for Department Leaders, Managers, and other users who need training on SmartVault Basics and Day to Day workflows. | | | | ✓ |
| Custom Guest User Video We'll create a custom welcome video for your clients that introduces them to SmartVault and how to use it. | | | | ✓ |