



Onboarding Program

Helping you navigate your
first few weeks with
DocuXplorer.



OUR FORMULA TO YOUR SUCCESS

- WHAT TO EXPECT
- MEET YOUR DEDICATED TEAM
- 4 STEPS TO SUCCESS



WHAT TO EXPECT WITH DOCUXPLORER

DocuXplorer has continued to improve the document experience over the past 25 years.

This onboarding program is our tried and true formula to help you build the strong foundation necessary to continue growing your business in the years to come.

DX is proud of its 98% client retention, with the majority of our clients sticking with us for upwards of 10 years.

DX is built flexible and is constantly improving to ensure what works today will also work 10 years from now.

DOCUXPLORER

Meet Your Dedicated Team

Allie



BUSINESS
DEVELOPMENT

allie@docuxplorer.com

Sara



ACCOUNT
MANAGER

sara@docuxplorer.com

Ron



TAXONOMY &
SUPPORT

support@docuxplorer.com

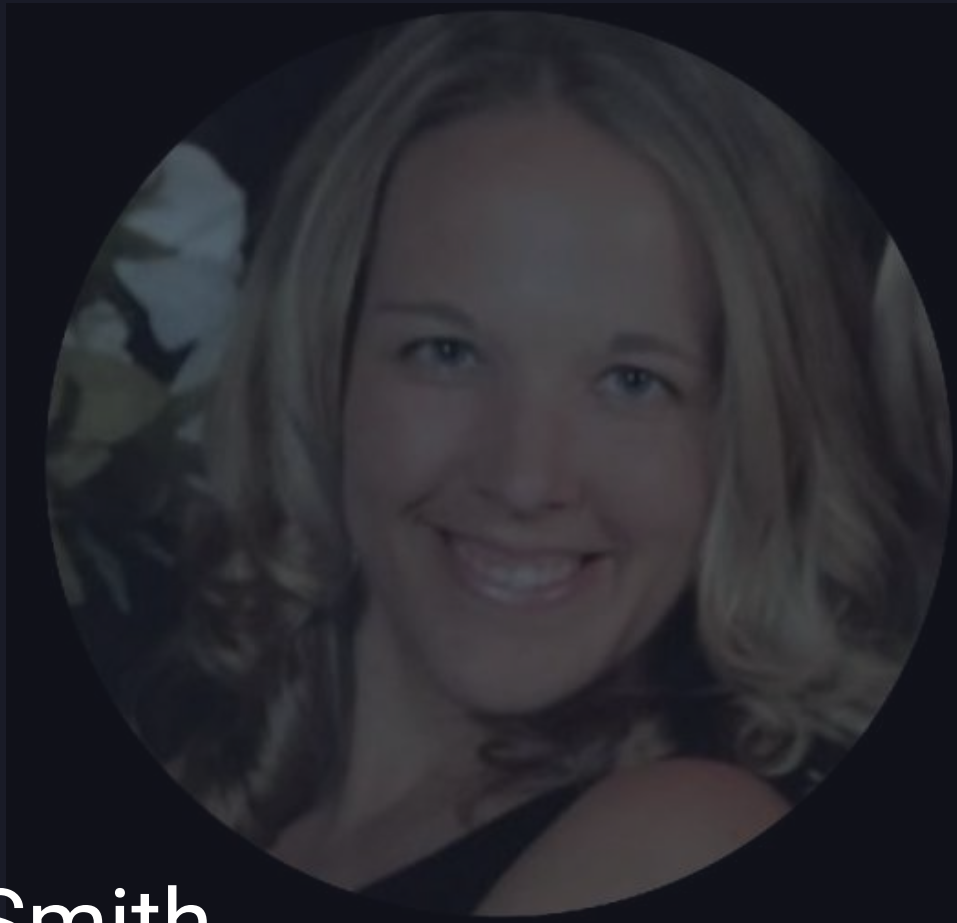
Matt



SUCCESS &
ADOPTION

matt@docuxplorer.com

Meet Your Account Manager



● Sara Smith

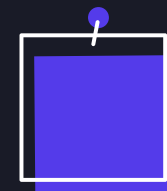
Account Manager
sara@docuexplorer.com
+1 (212) 799-5585



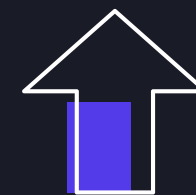
Will be your point of contact
for all questions now and
into the future.



Will guide you through the
onboarding process.

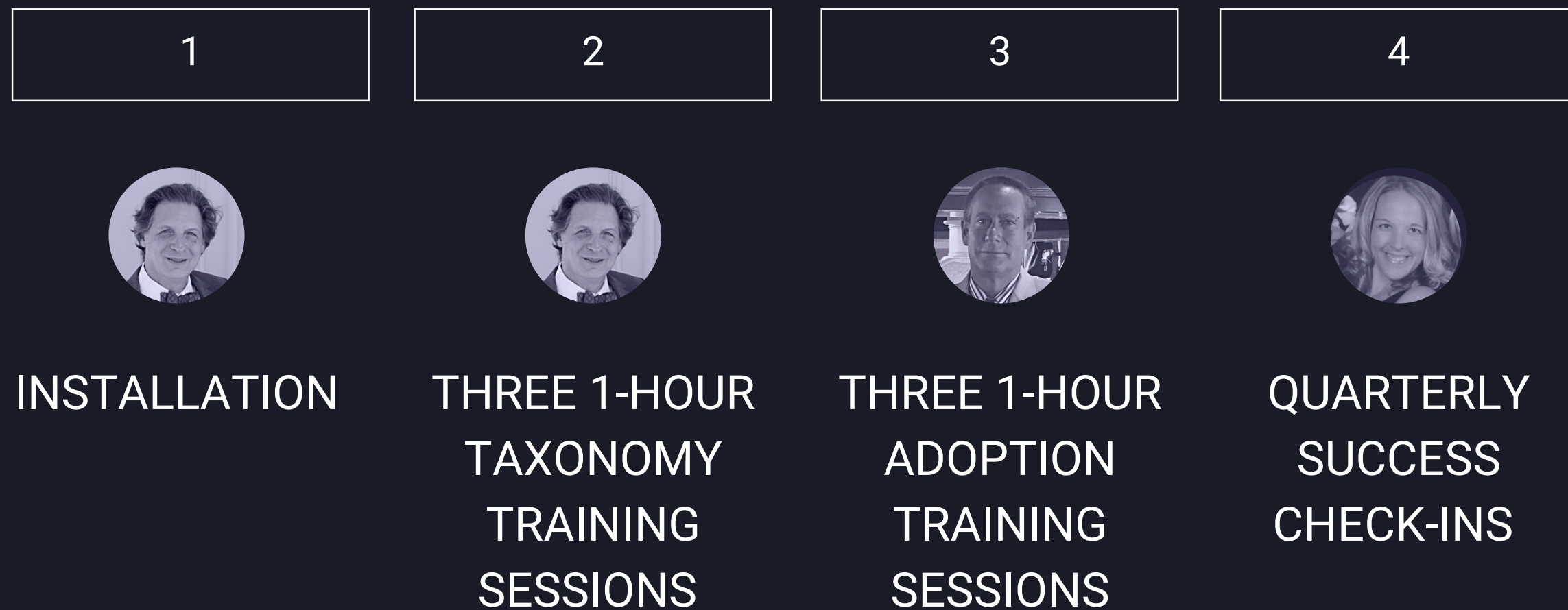


Will assist you in
determining your business
objectives and how DX can
help solve them.



Will host quarterly meetings
to ensure we're meeting your
goals.

Onboarding Timeline

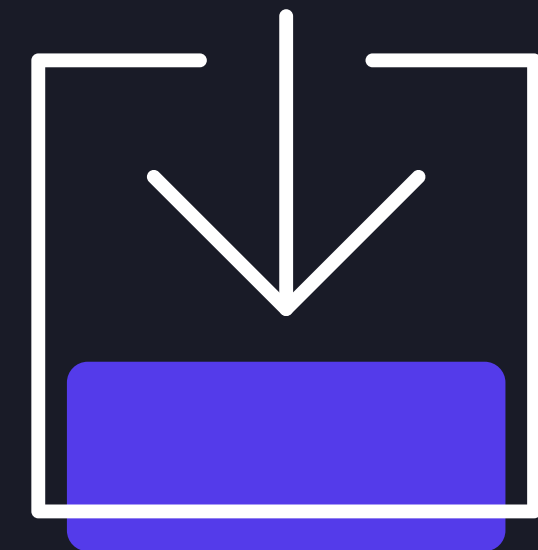


If you opt for the Pilot Program,
installation and taxonomy will be
completed during that time.

● INSTALLATION - 30 MINUTES

Installation takes as few as 15 minutes. Your DocuXplorer technician will assist in installing the software on your server and teach you how to install DX on your local computers.

If you've opted for us to host your data, download and complete the **DX Cloud User Registry** form and send to: support@docuxplorer.com



VIEW
SYSTEM REQUIREMENTS

DOWNLOAD
USER REGISTRY FORM



● TAXONOMY - THREE 1-HOUR SESSIONS

Your Taxonomy expert will help set up your Library Tree to guarantee the best search results for the types of documents you store in DX.

If you haven't already done so, download and complete your Taxonomy form and send to: support@docuxplorer.com

If you'd like more time with your taxonomist or for us to build out a custom workflow or Smart Capture template, refer to our [consulting price sheet](#).

DOWNLOAD
TAXONOMY FORM

CONSULTING
PRICE SHEET



DOCUXPLORER

• ADOPTION PROGRAM - **THREE WEEKLY CHECK-INS**

Get your team using the system fast. End users experience a quick onboarding as their primary responsibility is to add and find documents. Share these videos to help reinforce these simple steps.

VIDEO LIBRARY

ADD A FILE

FIND A FILE



DOCUXPLORER

● LONG TERM SUCCESS

Your Account Manager is invested in you and will be your point of contact now and into the future.

Now that you're up and running and your team is using the system, you're bound to have new ideas of how to take advantage of all the features of DX, like automated workflows and Smart Capture Templates. Your Account Manager will help you achieve the results you're looking for.

BENEFITS OF YOUR
SUCCESS CALLS

READ CLIENT
SUCCESS STORIES

CLEAN DESK
CHECKLIST





We're looking forward to working
with you.

Let's do this!