



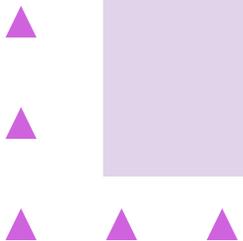
An Accelerated Implementation to Support Your Brokerage

The Applied Epic Digital Foundation

For customers who:

- Want to keep the momentum going
- Need minimal “homework” outside of implementation sessions
- Prefer a focused, collaborative approach

PLAN	DESCRIPTION
The Kick-Off	<p>We'll meet with your implementation team to set expectations and plan your migration to Applied Epic. The kick-off will cover:</p> <ul style="list-style-type: none"> • Access to Applied University • First-time login to Applied Epic • Initial backup of Applied TAM data
Configuration	<p>We'll assist you in cleaning up your Applied TAM data before the conversion process begins. The configuration process includes:</p> <ul style="list-style-type: none"> • Completing your configuration workbook • Attending a configuration review meeting • Holding an Accounting readiness meeting
Training	<p>We'll meet with your implementation team to set expectations and plan your migration to Applied Epic. The kick-off will cover:</p> <ul style="list-style-type: none"> • Learning the essentials of Applied Epic • Virtual group training





PLAN	DESCRIPTION
Data Conversion	We securely back up your Applied TAM data and conduct additional analysis in preparation for Applied Epic activation
Activation	<p>It's showtime! Your team can sign in and start using Applied Epic in their daily workflows.</p> <p>We understand how important it is for everything to run smoothly, and we'll be available to troubleshoot and support you whenever you need it.</p>
Post-Activation Services	<p>After you're all set up, we're here to help with ongoing activities like:</p> <ul style="list-style-type: none">• Customized Training• Post-activation data clean up• Additional configuration (if required)• Escalated support to address all user and technical concerns

Call 866.899.5120
www.appliedsystems.ca

