Client Implementation Summary

From Setup to Rollout

Planning

Pre-planning

IDS will provide a webinar demo and the Client Implementation Plan.

Project Kickoff Meeting

IDS will schedule a meeting with administrators on the project team to review the scope of work, identify goals and objectives for implementation, and determine user schemes and system settings.

System Setup and Data Integration

System Setup

Activate account with agreed upon settings.

Data Integration

IDS will work with the client to solve any issues or customizations needed for the data integration process.

Project Review

IDS will review the project scope and schedule with the client throughout the setup to make sure that end goals are accomplished within the client's timeline.

Training

Administrative Training

IDS provides system training to the administrators assigned to manage IDS.

Non Administrative Training

IDS will provide system training to non-administrators on importing data from the Loan Origination System into idsDoc, with additional training on the software functions and tools available to them.

Testing

Client will test the system to verify that agreed upon settings are to their satisfaction before the account goes live.

System Rollout

Client will go live with IDS.

Usage Maximization and Client Support

IDS will provide ongoing support through Client Services.

Email: service@idsdoc.com

Phone: (800) 554-1872

Chat service: www.idsdoc.com

Business Hours

Monday – Friday

6:30 am to 6:00 pm MST