finway Onboarding Standard

The aim of onboarding is to provide you with the best possible support so that you can start working with finway quickly.
During onboarding on finway, you will go through four steps with your personal contact person to integrate finway into your everyday working life as efficiently and smoothly as possible.

We are dependent on your assistance in areas such as providing important information and planning meetings. Our experience shows that onboarding takes around four weeks with efficient collaboration.
If you provide the required information more quickly, onboarding can also be completed more quickly.

Please plan enough time for your onboarding so that you can also work on your finway implementation and documentation of your process outside of the joint meetings.

Note if you want to use finway cards

In order to use finway cards, you must go through processes to verify your company (KYB & KYC). We will guide you through this step by step; card onboarding takes place in addition to the regular meetings. The duration of card onboarding depends on the complexity of your company structure and the co-operation of all persons involved. Card onboarding comprises at least a 30-minute meeting in which an authorized person from your company must be present.

The onboarding steps

The meetings in the onboarding process take between 30 and 45 minutes.

1 Kickoff call with your personal contact person (45 minutes)

We answer open questions and plan the timeline for your onboarding together with you. We also use the meeting to discuss your goals and expectations of finway and, in preparation for the next meeting, go through the upload Excel template that you have already partially completed and answer any questions that arise. We will discuss your cost center framework and check whether it can be easily implemented with finway.

2 Data upload & setup call (45 minutes)

After you have entered your master data in our upload Excel in preparation for this meeting, we will upload it to finway together during the meeting. Beforehand, we will check the upload Excel together so that as many sources of error as possible are eliminated. We also connect your bank and DATEV and set up the first workflows together.
After this meeting, you will be able to start using finway.

3 Admin onboarding (45 minutes)

In the admin onboarding session, we will discuss all the request types available to you, as well as the general process for invoice processing in the finway dashboard. In addition, we will give you tips and recommendations for preparing your internal documentation to make it as easy as possible for your colleagues to get started with finway.
Please prepare a concept for how you would like to use finway internally or how you would like to restructure the processes.

4 Final onboarding call (30 minutes)

In this meeting, we clarify any remaining questions. You will then start using finway productively and the onboarding process is complete. After this meeting, all employees involved in onboarding at your company will receive an automated survey regarding their onboarding experience with finway.