

Implementation Timeline

STEP 01

Implementation Meeting

Within 7 days of signing contract



Discussion Items

- Introductions of nCino and Client
- nCino implementation timeline
- Client's goals + objectives
- nCino's data requirements
- File transmission process

Action Items

- Client nCino admin will add other users to website
- nCino will send data extraction resources to client for each of client's data sources
- Client will extract data, reconcile to GL, and upload data files to nCino
- nCino will map the data file, take notes, and reach out to schedule the file mapping review meeting

STEP 02

File Mapping Review

Usually within 30 days of implementation meeting, will occur within 7 days of data files being uploaded to nCino



Discussion Items

- Review file mapping with client, clarify questions, and identify missing data fields

Action Items

- nCino will send over notes on the data files
- Client will complete loan type mappings in nCino
- Client will upload translation key for auto dealer, branch, and loan officer codes
- Client will upload modified data files, if needed

STEP 03

Data Reconciliation

Usually within 7 days of File Mapping Review



Discussion Items

- Best practices of data reconciliation using nCino reporting
- Review calculations settings

Action Items

- Client will reconcile their data in nCino to their general ledger

STEP 04

nCino 101

Within 7 days of client's confirmation that data is reconciled to general ledger



Discussion Items

- Basic report building and site navigation
- Report automation (i.e. saved filters, reports, and report packets)

Action Items

- Client will begin to create reports in nCino
- Client will send sample reports or report descriptions to nCino to review in the next meeting

STEP 05

nCino 102

Within 14 days of nCino 101



Discussion Items

- Review and build out the reports previously sent to nCino
- In depth, more advanced report building, customized to client's needs

Action Items

- nCino will continue to invite Client to attend webinars, training camps, account reviews, etc.
- Client will continue to build reports and analyze data in new, creative ways
- nCino web-based training is unlimited and free - please take advantage of this