Implementation Overview

Kickoff Meeting

During your implementation kickoff meeting, you and your Customer Success Manager will:

- Discuss your goals with FMX
- Review your implementation plan and timeline
- Learn about data entry options

Workflow Configuration & Data Migration Discussion

This is where you will review, with your CSM, the ways in which data can be added to your FMX site. This can be done in two ways:

- Manual entry
- Using FMX-provided Bulk Import Templates

During this meeting, you and your CSM will also review our Site Configuration Questionnaire, which covers workflow processes, form configurations, and user type permissions.

Training Sessions

FMX offers a variety of training options for your different User Groups. These include:

- Webinar training sessions
- Step-by-step user guides
- Pre-recorded training videos hosted on the FMX
- Support Center

During the required Administrator Training, your CSM will walk through the completed site configuration, log in through user types essential to your workflow process, and provide an overview of your site admin settings.

Go Live with FMX

FMX will provide resources for when you launch, such as a go-live email template, training videos, links to the learning center, etc. to help answer any questions that your staff may have.

*It is encouraged to go live with FMX at the end of the 60-day implementation period or soon after

Project Assumptions

- FMX's implementation services are provided for a maximum of 60 days.
- Sufficient and appropriate Customer resources set forth need to be available during the project (for both onsite and remote work).
- Customer will provide a point of contact (e.g., project manager) who is empowered to make decisions and approve direction. This resource will be available at least once each week to meet, review progress, and provide feedback and guidance. The customer needs to communicate regularly with FMX and provide FMX with timely feedback.