10. Onboarding Support

10.1 Our Onboarding Philosophy

Onboarding is not a technical exercise alone — it is a business-critical transition. Softrust and Bluelight's approach ensures **speed without shortcuts**. Every client is guided by dedicated technical and project managers, with a structured playbook covering discovery, connectivity, testing, and stabilization.

<diagram: Onboarding journey timeline — Kickoff → Setup → Testing → Pilot → Go-Live → Hypercare>

10.2 Step-by-Step Onboarding Plan

Step 1 – Kickoff and Alignment

- Project kickoff workshop with Finance, IT, and Compliance.
- Review scope, success criteria, and delivery timeline.
- Assign roles, responsibilities, and escalation matrix.

Step 2 – Environment Setup

- Provision SmartAPI tenant and client environments (UAT and Production).
- Configure connectivity (VPN, HTTPS, mTLS certificates).
- Enable dashboards and monitoring access for client teams.

Step 3 – Schema and Data Readiness

- Confirm canonical schema against client ERP or billing exports.
- Validate master data (TINs, HS codes, tax codes) against regulator resources.
- Upload or sync initial product and customer reference libraries.

Step 4 – Pilot Testing (Sandbox Mode)

- Submit first set of test invoices via ERP, BlueInvoice, Email, or BlueBox.
- Validate end-to-end flow with FIRS sandbox.
- Correct mapping issues, refine tax code and master data alignment.

Step 5 – User Acceptance Testing (UAT)

- Client Finance and Compliance test real scenarios: rejections, corrections, duplicates, and reconciliations.

- Sign-off once clearance rates and reconciliation match targets.

Step 6 – Go-Live Preparation

- Dry-run cutover with readiness checklist (connectivity, monitoring, alerts, rollback plan).
- Freeze changes in ERP integration until after go-live.
- Executive sign-off to proceed.

Step 7 – Go-Live and Hypercare

- Enable production connectivity.
- Submit pilot batch of live invoices, validate clearances.
- Scale to full production submission.
- Hypercare period with 24x7 monitoring, daily check-ins, and immediate defect resolution.

Step 8 – Transition to Steady State

- Handover to client IT and Finance operations.
- Confirm runbooks, knowledge base, and playbooks are in use.
- Close hypercare once stability confirmed for three consecutive days.

10.3 Dedicated Technical Support

- **Onboarding Manager** – single point of contact for client PMO.
- **Solution Architect** – ensures ERP-to-SmartAPI mappings and security alignment.
- **Integration Engineers** – configure SAP PI/PO, CPI, or BlueBox capture.
- **Finance Liaison** – guides Finance team through reconciliation and correction flows.
- **Compliance Lead** – ensures regulator alignment, evidence bundles, and audit readiness.

10.4 Testing and Troubleshooting Support

- **Structured Test Scripts –** covering happy path, rejection handling, duplicate prevention, and reconciliation.
- **Guided Troubleshooting** – SmartAPI provides root cause error messages (e.g., invalid TIN format, tax code mismatch).
- **Support Channels** – email, ticketing portal, hotline for critical issues.
- **Service Levels –** response and resolution targets aligned to client's chosen SLA tier (Silver, Gold, or Platinum).

<diagram: Testing and troubleshooting loop — submission → validation → rejection → correction → resubmission → clearance>

10.5 Client Responsibilities

To ensure smooth onboarding, clients are asked to:

- Provide ERP integration access (IDoc export, API credentials, or file drop location).
- Supply test data sets with valid customer and product master data.
- Nominate Finance and Compliance testers for UAT.
- Ensure internal IT support is available for network/firewall configuration.

10.6 Why Our Onboarding is Different

- **Predictable** – every step rehearsed, no surprises at go-live.
- **Comprehensive** – covers IT, Finance, and Compliance, not just ERP integration.
- **Supported** – dedicated experts on-call throughout onboarding.
- **Accelerated** – typical go-live in 10 to 12 weeks, compared to industry average of 16 to 20 weeks.