Anantya.ai Client Onboarding Process (India)

🔹 Step 1: Initial Client Engagement

Key Person: Salesperson
 The Sales Team connects with the client to introduce Anantya.ai's offerings and understand the client's use case.

Key Outcomes:
- Client's needs and expectations are recorded.
- Communication channel established (email or WhatsApp group) and sending the onboarding mail should be done simultaneously

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🔹 Step 2: Agreement, Payment & Internal Handoff

Key Person: Salesperson

After the initial engagement:
- The **Salesperson** collects the following from the client

  (Note: **Client Email Thread 1**- This will be a separate email thread between salesperson, accounts & the client with no involvement of Product & CX team)

  ✅ **Signed Agreement**
  ✅ **Payment Confirmation**
  ✅ **Invoice Copy**
  ✅ **KYC Checklist**
  📄 **KYC Checklist**

- Once done, the **Salesperson** will email the following details to the **Account Managers** along with the **signed documents** & simultaneously create a **WhatsApp group** with **Client, Account Managers & Priority Support Number:** +91-9355316660 included.

Email to Account Manager must include:

Internal Mail 1: After Closing Sales
Subject: Company Name x Anantya.ai | Initiate Onboarding To: support@anantya.ai Cc: divyanshu@anantya.ai, lalit@anantya.ai, suraj@anantya.ai, priyanka@anantya.ai,

mokshika@anantya.ai, lakshay@anantya.ai
Inclusions
Client Details > Company Name: > POC Name: > POC No. > Email: > Country: > Billing Base: > Client Type: Payment Status: Agreement Status: Features offered: Integrations (if any): KYC Checklist:
Note: Agreement & Payment to be sent on the same mail within 15 days of sharing the credentials if the status is marked as pending in the initial mail but there is approval from **Country Head.**

◆ Step 3: Onboarding Form & Client Meeting

Key Person: Account Manager

- Upon receiving the above handover, the **Account Manager** sends the following email to the client:

Client: Email Thread 2
Subject: Company Name x Anantya.ai | Account Management To: Client id Cc: support@anantya.ai, sales person, mokshika@anantya.ai, lakshay@anantya.ai
1st Email
Emailer with embedded Typeform link & Onboarding Essentials
2nd Email
For scheduling the onboarding meeting
3rd Mail
For scheduling the panel training after the credentials are shared

Successive Mails
All the conversations related to ongoing account management including sharing the feature updates & monthly check up calls & successive payments for messaging

Once the client submits both forms, the **Account Manager** schedules and conducts the **Onboarding Meeting**

◆ Step 4: Onboarding Meeting

Key Person: Account Manager

- The Account Manager schedules and conducts the onboarding meeting.

- After the meeting, the **Account Manager** will email the following details to the **Central Support Team** on onboarding@anantya.ai along with:
  - **Screenshot of FBM (Facebook Business Manager) Portfolio**
  - **Legal documents for Meta Business Verification (received through typeform)**
  - **Signed KYC Checklist by salesperson.**

Email to Central Support Team includes:

Internal Mail 2 : After Onboarding Meeting
Subject: Company Name x Anantya.ai | Initiate Account Creation **To: onboarding@anantya.ai** **Cc: support@anantya.ai, sales person**
Inclusions
Details > Client Name: > Company Name: > Address: > WABA ID: > Business ID: > Phone Number(WA No to be integrated): > Country: > Salesperson: > Country Head: > Billing Base: (Submission, Executed, Delivered) > Email: (On which the credentials to be shared) > BSP Name: > Features Offered:

Attachments
> Screenshot of FBM (Facebook Business Manager) Portfolio
> Legal documents for Meta Business Verification
> Signed KYC Checklist by both salesperson and account manager.
> Payment invoice and payment status
Note: Agreement & Payment to be sent on the same mail within 15 days of sharing the credentials after receiving from the sales

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◆ Step 5: Configuration & Credential Setup

Key Person: Central Support Team

- The Central Support team performs configuration on the **Route Portal** and **Anantya Hub**.

  (Note: If BSP is **Karix,** no configuration on BSP portal is required)

- **Login credentials** will be shared with the client within **24–48 hours**, **if no obstacles arise**, through onboarding@anantya.ai (bcc: support@anantya.ai)

Potential Obstacles:
- FBM is **restricted**
- Account status is **disabled**
- **2FA (Two-Factor Authentication)** not disabled for the phone number
- Incorrect details shared.
- **Incomplete or mismatched documentation**

Note: Due to these obstacles, there may be delays of 7 days or more in processing.

◆ Step 6: Meta Business Verification

Key Person: Central Support Team

Simultaneously, a request is raised on BSP for Meta **Business Verification**, using the:
- FBM Portfolio Screenshot
- Legal Documents

❖ **Verification is expected within 24-48 hours**, provided there are **no obstacles**.

❖ **Common Obstacles:**
- Legal name **not identical** to the one in documents
- Address not updated on FBM
- Incorrect or outdated website URL
- Website not **publicly accessible** (e.g., restricted by location or password)

Note: Due to these obstacles, there may be delays of 4-5 days or more in processing.

◆ **Step 7: Panel Training**

Key Person: Account Manager

Once credentials are shared:
- A training session is conducted with the client on how to use the **Panel**

Training Includes:
- Walkthrough of all panel sections, features & platform usage discussion
- CRM & website widget integration details
- Recording any **custom requirements** (e.g., chatbot flows, reports, CRM triggers)

◆ **Step 8: Post-Onboarding Checklist & Handover**

Key Person: Account Manager

- If all onboarding steps are complete:

✅ **Final Handover & Support Alignment**

- Client is marked as **Successfully Onboarded**
- Client is added to the **CSM/Monthly Review Cycle** of the **respective Account Manager**

Step 9: Integration requirement Mail (If required)

Key Person: Priyanka & Divyanshu

- The Account Manager initiates an email for integration requirements.

<table>
<tr><td>Client: Email Thread 3 (Any kind Integration/API related requirements)</td></tr>
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Subject: Company Name × Anantya.ai | Integration

To: Client id, priyanka@anantya.ai
Cc: support@anantya.ai
divyanshu@anantya.ai, sales person, mokshika@anantya.ai, lakshay@anantya.ai

Hi Team,
Greetings of the day!

I'm initiating a separate thread for all integration-related conversations.

priyanka@anantya.ai & divyanshu@anantya.ai from the team will be overseeing the process.