Synergyze License-Based Onboarding SOP Template

# 1. Pre-Onboarding Checklist

- Confirm license type: Brand, Manufacturer, Retailer

- Collect KYC documents & compliance declarations

- Setup API integrations (Banks, Logistics, Payments)

- Assign internal point of contact (Tech Support)

# 2. Onboarding Phase

- Create user account & assign appropriate license via Synergyze Admin Panel

- Assign user roles based on operational layer:

\* Tech Provider: Platform Admin, Compliance Manager, API Specialist

\* Buying House: Procurement Manager, Production Manager, Finance Controller

\* Marketplace: Retailer Onboarding, Sales Manager, Logistics Coordinator

- Send Welcome Email Template with role & compliance overview

- Provide access credentials (AWS Cognito) and Service Catalog license details

# 3. Post-Onboarding Checklist

- Buying House Layer: Setup procurement workflows, vendor onboarding

- Manufacturer Layer: Configure MES & production schedules

- Marketplace Layer: Retailer product listing setup, OMS configuration

- Compliance: Ensure KYC, GST filing configuration, Smart Contract enablement

- Financials: Link escrow account, initiate SCF application (if applicable)

# 4. Reference Attachments

- Synergyze Role-wise Daily Task Checklist

- Visual Journey Flowchart

- License Pricing & Governance Terms