























Planday's onboarding journey

This table documents a typical onboarding journey for Planday and how we support your client setting up their portal. Whether it be an article, email or one of our wonderful support team we'll always be here to help.

Timelines		Day 1	Week 1	Week 2	Week 4	Ongoing
Milestones		Start trial	Set up business	Set up & invite employees	Complete pay run	Ongoing use of Planday
Support method	Help Centre content		 Set up guide (part 1) Xero Payroll integration	 Set up guide (part 2) How to set up and invite employees How to use the app (for employees)	 Payrun checklist	 Help Centre Video Library
	Emails	 Login details Welcome (Help Centre + book a session)	 Integration	 Employee invite Reiterate set up	 Payrun checklist	
	Customer support	 Welcome call  Access to chat	 Onboarding session  Access to chat	 Onboarding session  Access to chat	 Pre pay run consultation  Access to chat	 Access to chat
	Customer achievements	 Access to portal	 Set up their business Import employees Import award and assign to employees Build a roster	 Set up Punch Clock Set up leave Invite employees	 Complete pay run	 Ongoing use