

ONBOARDING

Let's get you started ✨

Kudos on enhancing efficiencies in your operation (and your finances), as well as brightening your team's financial well-being with our all-in-one payment platform and money management tools.

You are just steps away from unlocking your AnyDay access and getting started with instant tip payouts.

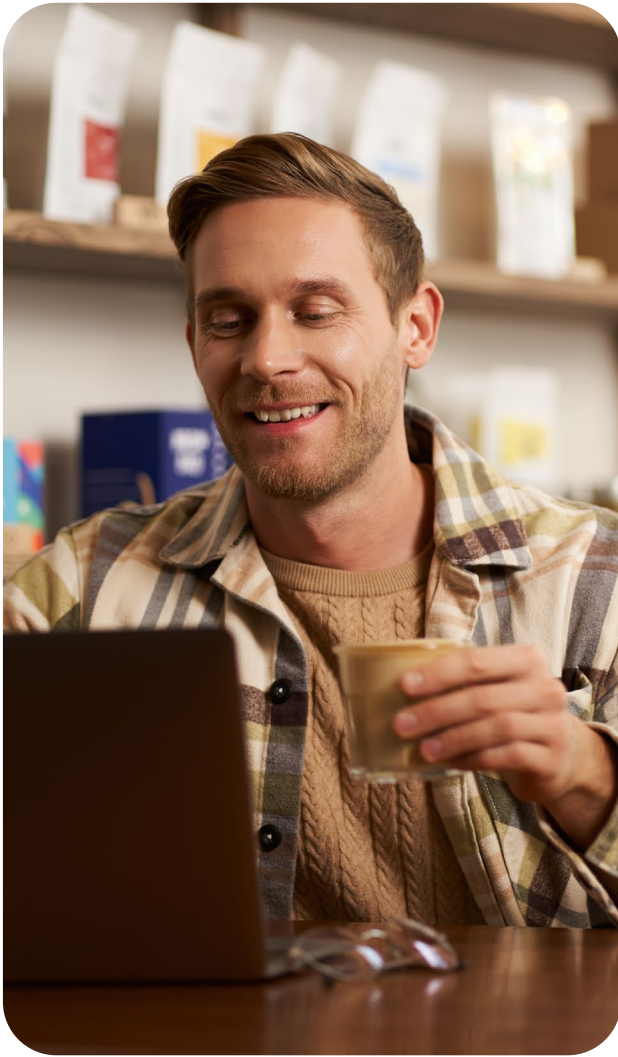


Registration Process

By now, you should have completed your Master Service Agreement. Go you! Onto the next steps:

- 01 Due Diligence** is a part of our setup process. Don't worry, we do all the heavy lifting. We use this opportunity to understand your business.
- 02** Because we are a fintech company handling money with banking partners, we will need to complete what's called "**Know Your Business**" (KYB). Please ensure you prepare the following documents to upload to our Due Diligence form:
 1. Articles of incorporation (or partnership agreement, etc.).
 2. Proof of business address from the past 90 days (e.g., utility bill).
 3. Completed Beneficial Ownership Attestation ("BOA") form.
 4. Void cheque (if you'd like to fund your wallet automatically via pre-authorized debit).
- 03 Funding Your Wallet**
In the Due Diligence form, you will be prompted to select how you'd like to fund your wallet for payouts.





STEP 02

Onboarding Setup

Once Due Diligence is complete, you will receive one final form to help us set up your client portal.

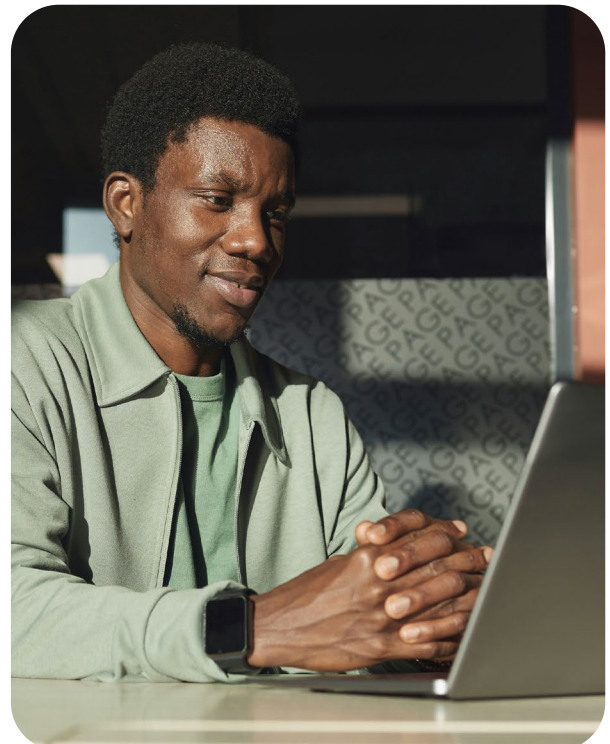
You will need to complete the required fields in the form to continue, such as:

- Your portal administrator(s) information
- Department setup (e.g. FOH, BOH)
- Float amount (the funds to pay your team at the desired frequency)

STEP 03

Book your onboarding

You will then be prompted to book your onboarding training session via a calendar link.





STEP 04

Review your training materials

Once your portal is set up, you will receive an email with a link to access your AnyDay portal training videos. Don't worry, they are short and easy to follow. Get a jump start and access them right here.

[Watch now](#)

STEP 05

Your onboarding training session 🧑💻

We'll walk you through the AnyDay portal to show you how to add new employees, pay your employees, set admin user permissions and generate reports.



STEP 06

Make your first wallet deposit 💰

Fund your master wallet so you can send payments to your employees.

← Load a wallet

Select a wallet to load funds

Wallet

Amount

Amount

Select a bank account to load funds from

☒ TD bank account - ending in 1234

☐ CIBC bank account - ending in 2345

Happy Employees Get Paid AnyDay.

Give employees fast, flexible and convenient access to their earnings.

[Email us](#)