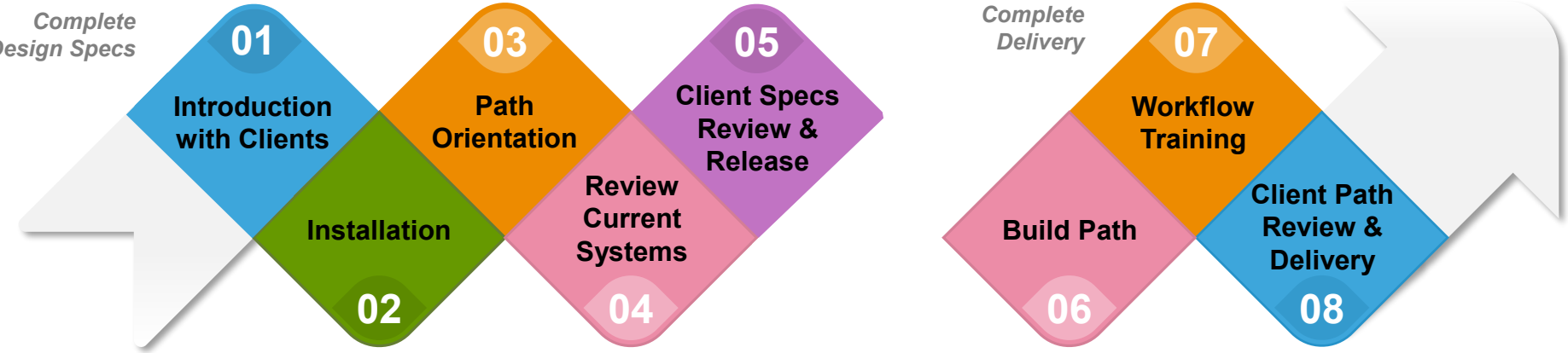
The Onboarding Roadmap

Admin Training 1-3
Loan Application Training
Role Trainings
Reports Training
Pricing Call (IA)
POTS Training

End-to-End Call

Phase I.
Complete Design Specs

Phase II.
Complete Delivery



V3.0

Path Onboarding Calls and Sessions: What to Expect

Regular PM Touchpoint Calls

Your Calyx Path Project Manager meets with you regularly to stay connected, aligned, and moving forward together throughout your onboarding. Each touchpoint provides dedicated time to review progress, discuss open items, and plan for upcoming milestones. These conversations keep everything clear, supported, and on track, so there are no surprises as you move toward a successful launch.

Introduction **Path Welcome Call** (30 min.)
Kick off the Path implementation by introducing key team members and laying out the project. In this session, we ensure everyone is aligned on next steps for a smooth start. After the call is completed we will confirm initial details (such as user lists, business units, logos, and your desired Path URL).

Installation **Path Email Setup Call** (30 min.)
A technical session to configure your organization's email integration within Path. Our team works with your IT staff to set up your email domain and ensure Path's communication features (like sending loan updates or notifications) are properly enabled and branded for your company. Your Point templates, cardex, and custom items will be exported then imported into Path.

Installation **Zip Training and Review** (1 hr.)
If applicable, this session introduces your team to the Zip borrower portal. We demonstrate how borrowers and loan officers start loan applications through Zip, and guide initial portal setup. This early orientation ensures your team is comfortable using Zip from the start.

Path Orientation **Loan Application Training** (1 hr.)
The Loan Application Training is a guided walkthrough of the Loan Application, Fees Worksheet, and user interfaces. In this session, your team learns how to create loans and navigate Path's core features, gaining familiarity with the system's layout.

Path Orientation **Admin Part I** (1 hr.)
The first of three in-depth sessions for your system administrators. This initial admin training focuses on establishing your organization's foundation in Path, including user and business unit setup, contacts, documents, conditions, and key system components such as Field IDs and the Pipeline Overview. Administrators will gain an understanding of the core configuration areas that support daily system management and loan operations.

Path Orientation **Admin Part II** (1 hr.)
Build on the foundational setup by configuring the loan structure components that drive your lending process. In this session, administrators will review loan programs, closing cost scenarios (CCS Fees), checklists, and templates, while learning how these settings work together to support consistent loan setup and workflow management throughout Path.

Path Orientation **Admin Part III** (1 hr.)
Complete the administrator learning path by exploring Path's automation and customization capabilities. This final session covers general settings, notifications, custom screens and fields, dashboards, and data fields, providing administrators with the tools needed to tailor Path to their organization's processes and reporting needs while maintaining the system day-to-day.

Path Orientation **Individual Role Training** (1 hr.)
This session provides focused training tailored to each user's role within Path, such as Loan Officer, Operations, Closer, or other applicable functions. Participants will learn the screens, workflows, and responsibilities relevant to their day-to-day activities. The goal is to ensure each team member is comfortable performing their role in Path before moving forward in the onboarding process.

Path Orientation **Basic Reports Training** (1 hr.)
The training provides an introduction to Path's reporting tools and capabilities. We demonstrate how to run standard reports, create simple custom reports, and interpret key metrics, empowering your team to monitor performance and compliance using Path's built-in reporting features once you're live.

Path Orientation **Pricing & Lock (If Applicable)** (1 hr.)
This session reviews your organization's pricing structure, products, and business requirements. We will discuss how pricing is managed today and confirm the information needed for configuration in Path. The goal is to align on pricing requirements before the system is built and reviewed during Pricing Validation.

Path Orientation **Path Online Ticketing System (POTS) Training** (30 min.)
This training introduces the support portal for Path. We show your team how to submit support tickets, check status updates, and use POTS effectively so that after go-live, you can quickly get help and track any technical issues or questions through our support system.

Review Current Systems **Point to Path Configuration Call** (2 hrs.)
If you're migrating from Calyx Point, this call ensures a smooth transition of data and settings. In this call, we review your current system's templates, forms, and workflows and determine how to best carry them over or re-create them in Path, so that your new system reflects your established processes.

Reports and Customer Reviews **Discovery Call** (1 hr.)
A collaborative deep-dive into your mortgage operations and requirements. During this session, we discuss your current workflows, pain points, and goals in detail – information our team uses to tailor Path's configuration and design specifications to fit your business needs.

Build Path **High Level Walkthrough** (1.5 hr.)
At this point, your Path configuration is finished. This is a review of the configured solution, highlighting key workflows, templates, business rules, and integrations that have been implemented to support your organization's processes. This session provides an opportunity to validate the overall design, confirm alignment with requirements, and identify any adjustments needed before moving forward.

Build Path **Pricing Validation Call** (1 hr.)
If applicable, this session will be used to review and validate pricing configurations associated with your workflow. During the call, we will confirm loan products, pricing rules, adjustments, and related settings to ensure the system is configured according to your organization's requirements and expectations prior to implementation and launch.

Workflow Training **End-to-End Call** (1.5 hrs.)
In this final overview call, we walk through a complete loan scenario in your fully configured Path environment. It serves as a comprehensive review of the entire process – from application in Zip to closing in Path – to validate that all configurations meet your requirements and that your team is ready for production use.

Workflow Training **Zip to Path Review Training** (1 hr.)
This session verifies that loan applications flow seamlessly from Zip into Path. We run a test loan submission through Zip to confirm it transfers correctly into Path. This final check ensures the Zip-to-Path integration is working properly before you go live. This is completed when you are ready to cut over from Point to Path. If you are already a current Point customer, then no training is needed.

Delivery **Customer Acceptance Call** (30 min.)
This session serves as the final project review and formal acceptance of your Path system prior to go-live. Our team will revisit the completed configuration and implementation deliverables with you to confirm that all agreed-upon requirements have been met. We will also address any final questions or open items, ensuring your team is confident and fully prepared as you approve the system for launch.

Congratulations! You have completed your Calyx Path Onboarding.

Your Path LOS is successfully configured.