



1. Buying

- Contact Way2B1 Sales
hello@way2b1.com
- Receive Services Agreement
(*optional*) Software Demo
- Choose a desired URL e.g.
(*client.way2b1.com*)
- Sign Services Agreement
- 3-5 Business Days Processing

2. Onboarding

- Complete a short survey to help us tailor your experience
- Administrator Training with Client Success (1 hour)
- Invite Users, Configure Processes, Set Up (1 hour)
- Property Manager Training with Client Success (30 minutes)
- Additional Training Sessions

3. Log On

Access your virtual Family Office on Way2B1

