Topkey + Track: 2 Week Onboarding Guidelines

Overview

Getting up and running on Topkey takes roughly two weeks and about 90 minutes of your time, split across two 45-minute sessions. Once you complete your intake form, we'll spin up your account immediately and you can log in and explore before your first call.

Before Your First Meeting

Complete your company's intake form. This takes about 3 minutes to fill out. Once it's back, your account is provisioned and you can log in and explore before your first call

Meeting 1: Connections & Configuration (45 min)

This session is about getting everything plugged in so Topkey can start receiving data. You'll share your screen and walk through setup with your Topkey rep. Here's what gets done:

Bank Accounts Connect your operating and trust accounts via Plaid. You'll authenticate directly through your bank's portal. Only connect the accounts you plan to use for paying owners and vendors — others can be added later.

User Setup Team members are added with role-based access:
- Admin — full access (typically the owner/operator)
- Manager — operational visibility
- Bookkeeper — expense review, coding, and QuickBooks sync

Integrations

- **Track:** Connected via API tokens you generate directly in Track (Settings → Company Setup → API Keys). Copy the key and secret into Topkey under Settings → Connections → Integrations, then configure how expenses export to Track — as a Work Order with Bill (recommended), Work Order with Owner Charge, or Bill Only. Once live, properties sync automatically, owner reference lists pull directly from Track's API, and expenses push back into Track with hyperlinks to the source record. You can set Track or Topkey as your source of truth for vendor and owner data to prevent API overwrites.

- **QuickBooks Online, Netsuite, Xero, Etc:** Connected via admin login consent in about 60 seconds. Full configuration — chart of accounts mapping, payment liability accounts, class/location settings — is handled in a follow-up session.

- **Amazon Business:** Connected and configured to import itemized transaction data automatically. No receipt saving required; you simply add a PO or property reference at the time of purchase.
- **Breezeway (if applicable):** Connected via API tokens coordinated through Topkey's partner team. Once live, tasks flow from Breezeway into Topkey automatically so nothing goes unbilled These can be filtered by department.

Cards
- **American Express:** Connected through the Amex portal. Primary cards are added manually; supplemental employee cards populate automatically once transactions begin flowing.
- **External cards (Visa/MasterCard):** Added manually under the External Cards section. A cardholder is assigned so they receive text notifications at the point of purchase.
- **AMEX Virtual cards:** Can be created immediately and added to Apple Pay or Google Pay wallets. Strongly recommended for field staff — they receive the expense text right at the time of purchase rather than days later when using a physical card.

Transaction Settings: You'll configure what makes a transaction "complete" — receipt requirements, memo fields, receipt thresholds, exemptions by merchant or cardholder, and reminder cadence. Daily reminders are recommended while the team is building the habit.

Approval Workflow: Set who must approve transactions before they sync to QuickBooks. Most companies start with the admin or owner as approver and delegate to a bookkeeper once the process is dialed in.

Between Meetings (1–2 weeks)

Your Topkey rep handles backend coordination while transactions begin flowing in:
- Coordinates Track and Breezeway API token setup (if applicable)
- Confirms QuickBooks connection is stable

Your team should:
- If on AMEX, Issue virtual cards to field staff and load them into Apple Pay or Google Pay
- Have cardholders become comfortable with the mobile webform flow as they are notified when a new transaction occurs
- Begin forwarding vendor invoices to your unique Topkey bill pay email address
- Add vendors you know you'll be paying regularly

Meeting 2: Getting in the Driver's Seat (45 min)

This session shifts from setup to workflow. Your rep walks through the system live with your actual data flowing in.

Expense Management Live Training: Walk through the transaction feed — reviewing receipts, coding expenses, flagging incomplete items, and approving transactions for QuickBooks sync.

Your rep will show you how to take advantage of our powerful AI Filters to establish dynamic and saved searches that highlight details you frequently revisit (incomplete, billable to owner, corporate, etc.), send SMS reminders to field staff, and use tags to stay organized across your team.

Bill Pay & Vendor Invoices: Live Training Walk through the full bill pay and vendor invoice workflow.

Q&A: Open floor for any questions from your team before you go fully live.

Field Staff Training Day (Recommended)

Before transactions start flowing in, it's worth taking time to walk your field staff through the text-based receipt submission process. This doesn't need to be formal — even a quick team huddle to show staff what the text prompt looks like, how to upload a receipt, and how to add a memo goes a long way. The sooner the team is comfortable with the workflow, the cleaner your data will be from day one. This is recommended but not mandatory.

After Onboarding: Ongoing Cadence

Following the two setup sessions, Topkey schedules bi-weekly check-ins. You set the pace — these continue as long as they're useful and wind down when your team is fully self-sufficient. Most customers reach that point within the first couple of months.

What to Expect in Practice

Save 20+ hours a week on Track. Process thousands of work orders, owner charges, receipts, and bills with the click of a button. Reduce owner statement prep from days to hours.

Based on Western Property Management's experience after onboarding on Track:
- Month-end close cut from 3+ weeks to just a few days
- Recovered $10K–$20K per month in previously missed billables
- Field staff receipt compliance improved substantially after switching to virtual cards (immediate text vs. 2–3 day delay with physical cards)
- Vendor invoice processing time reduced by an estimated 50–75%

A Note on Timing

The two-week estimate assumes reasonably prompt responses on the intake form and any token or credential requests. The platform setup itself is fast — the bottleneck is almost always coordination, not complexity. The more responsive your team is early on, the sooner data starts flowing and the system starts working for you.